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Development Agreement (ERDA)

Government of New Brunswick
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Entente de Développement
Économique et Régional (EDER)

THE LOWER SAINT JOHN RIVER VALLEY TOURISM DEVELOPMENT PLAN

FINAL REPORT

Prepared For:

N.B. Department of Tourism,
Recreation and Heritage

October, 1988

In Association with
Laventhol & Horwath Inc.

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October 14, 1988

88-0522-02

Mr. Lorne McGuigan
Department of Tourism,
Recreation and Heritage
Saint John Regional Centre
439 Prince Street
Saint John, NB
E2M 1R2

RE: LOWER SAINT JOHN RIVER VALLEY TOURISM DEVELOPMENT PLAN

I am pleased to enclose herewith our final report on the above project.

This final report incorporates appropriate input received from the Steering Committee. Where appropriate, it also incorporates input received from the public meetings held in early October.

I trust this document will provide a meaningful framework for development of the tourism industry in the Lower Saint John River Valley.

Thank you for the opportunity to work with you, your Steering Committee and the many municipal and industry representatives on this interesting project.

Allan Fiander, P. Eng.
President

ADF/rc

Enclosure

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INTRODUCTION

1.0 INTRODUCTION

1.1 Preamble

The Lower Saint John River Valley is well endowed with unspoiled natural physical features that appeal to visitors and residents alike. The slowly flowing and meandering river waters, the numerous uninhabited islands and expansive flood plains, the aged and stately elm, oak and maple trees, and the network of river tributaries and adjoining lakes of the Lower Saint John River Valley present a timeless image, becoming of New Brunswick's reputation as "The Picture Province". However, despite these natural endowments, the region's tourism infrastructure is relatively underdeveloped and considerable potential tourist opportunities remain untapped. As a result, the region faces the dilemma of building a commercially viable tourism industry and support infrastructure without destroying its natural attractiveness and integrity.

It is apparent that residents do not wish tourism development at any cost. Preservation of their environment, culture, heritage and quality of life are given high priority alongside commercial development and economic growth. **"Success Without Excess"** may best exemplify the development approach to the tourism industry desired by residents of the Lower Saint John River Valley Region.

Input received from both series of public meetings and the Project Steering Committee were consistent in **focussing the tourism strategy on the natural and heritage strengths of the region**. At the same time, it was clearly indicated that the tourism strategy should **avoid** concepts which are oriented toward **large scale, man-made attractions**. The region can achieve a uniquely competitive tourism market position without pursuing the major "themed" attractions options. This can best be accomplished by concentrating on enhancing and promoting its natural and heritage strengths for the principal target market segments.

Development of the tourism industry in the region requires **carefully selected product improvements which are consistent with the general emphasis on the low key, natural, historic and cultural attributes of the Valley area**. At the same time, it will be necessary to **improve packaging, promotion and coordination** of the existing and future tourism product.

Clearly, a tourism development strategy for the Lower Saint John River Valley is necessary to ensure tourism development goals are achieved and prospective tourism opportunities are evaluated within an environmentally conservative framework. This final report presents a proposed Tourism Development Strategy and Implementation Plan for the Lower Saint John River Valley Region of New Brunswick. Furthermore, the proposed strategy takes maximum advantage of the region as the basis for developing a viable tourism industry. At the same time, the strategy preserves and protects those features which are the basis of its attractiveness.

1.2 Study Background

This study of the Lower Saint John River Valley (Reversing Falls to Mactaquac Dam) and its tributaries has been jointly funded by the Federal Department of Regional Industrial Expansion and the New Brunswick Department of Tourism, Recreation and Heritage under the Canada/New Brunswick Tourism Subsidiary Agreement on Tourism Development. The study is one of a series of Regional Tourism Studies being done in various areas of the Province. It is the first comprehensive plan for the Lower Saint John River Valley tourism region.

Initiative for the study was provided most prominently by the Lower Saint John River Valley Promotion Association and the Chambers of Commerce of local municipalities. Support for the study has been motivated through a cooperative effort among the Provincial and Federal Governments, the various municipalities of the Study Area and numerous private interests. A Steering Committee representing the interests of these public and private organizations was struck to define the project, review study progress and provide input to the Consultant to ensure all interests were included and the study proceed as intended.

1.3 Scope and Objectives

The scope of the study plan is presented in the Terms of Reference as follows:

> "The plan must be strongly oriented towards private sector and municipal development over the next five years and will include an accommodation requirement analysis for the Study Area as well as an analysis of quality and quantity of services and attractions. It must also include a marketing assessment of the areas' attractions and services. The plan must also give consideration to the roles and requirements of the local tourism industry related organizations."

The study Terms of Reference also provided several objectives as follow:

Phase I:

To provide a general overview or position of the Region in terms of its importance to the tourism industry. This should include a profile of the industry and its situation such as seasonality, employment, visitation, existing and future trends. An overview and analysis of existing marketing/promotion activities should also be included.

To carry out a market analysis of existing and potential markets including business and pleasure travel for the Study Area. This analysis should include a forecast of visitation to the Study Area as well as future tourism trends as applied to the area's resource base. Such trends should include items such as transportation, attractions, services, and human resource needs. Year round integrated tourism is also a major consideration in this process. Particular emphasis should be given to the year round potential of all markets (ie. special interest, recreational, cultural, historical sites, convention, bus tours, automobile, etc.) and the ability of the area to compete with its competitors.

To carry out an accommodations needs study for the Study Area, and Fredericton in particular, which will include roofed accommodations (seasonal and year round) and campgrounds. Roofed accommodations will include hotels, motels, hostel (elder and youth), guest houses, holiday farms, country inns, bed and breakfast, etc. The needs study should analyze the supply/demand and quality of accommodations and recommend upgrading and addition of new units where necessary.

To carry out a supply/demand and quality analysis of attractions and tourism related services and activities in the Study Area including use of the abandoned CNR right-of-way along the Saint John River as a recreational corridor. Tourism related attractions include major sport, recreational and cultural activities. Tourism related services and activities include restaurant, gift/craft shops and tourism information centres. Boating activities should be considered in light of the Recreational Boating Study.

Phase II:

To formulate an overall tourism industry development and marketing concept tied in to specific objectives for the Study Area. The concept should not consist of a list of projects, but should be in keeping with the existing destination concept used in the provincial strategy and should test the individual destination and service areas.

To prepare an industry strategy based on opportunities which are financially and economically sound and which are in harmony with the general aspirations of the area's residents. The recommendations and components of this strategy must be substantiated by the consultants on the basis of empirical data and future trends.

The consultant must produce an implementation plan outlining the roles and responsibilities of the various industry groups with respect to implementation of this plan and indicating priorities and projected costs for development and marketing activities.

To carry out an economic impact assessment of the costs in current year dollars of various projects recommended and the economic benefits with emphasis on expenditures, employment generation and taxes to be accrued from completion of those projects.

1.4 Study Area

The Study Area defined in the Terms of Reference includes all or part of the following counties of New Brunswick: Saint John, Kings, Queens, Sunbury and York. Specifically, the Study Area includes all of Kings, Queens and Sunbury counties and the Saint John River Valley portions of

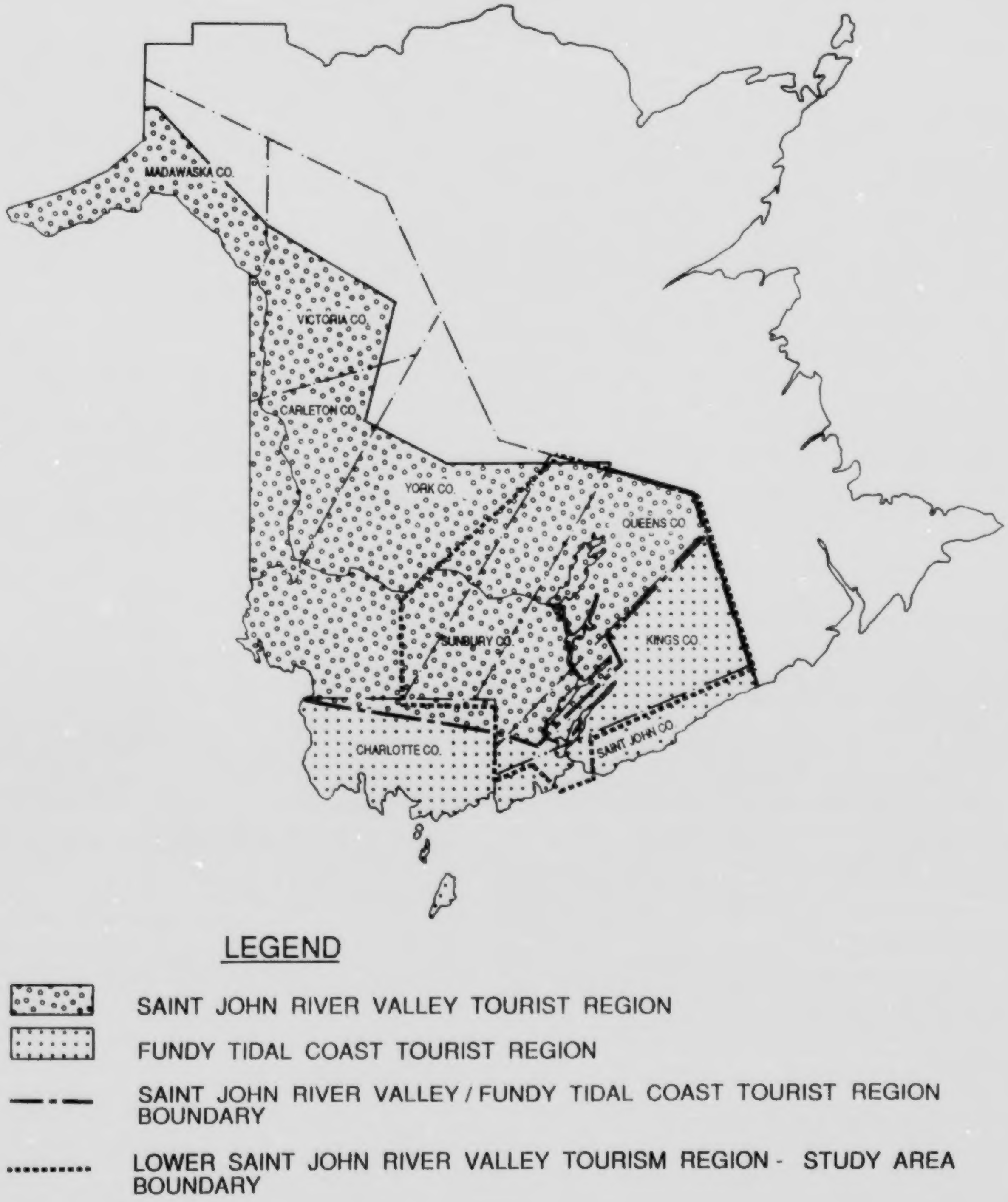
MADAWASKA CO.
VICTORIA CO.
CARLETON CO.
YORK CO.
QUEENS CO.
SUNBURY CO.
KINGS CO.
SAINT JOHN CO.
CHARLOTTE CO.
LEGEND
SAINT JOHN RIVER VALLEY TOURIST REGION
FUNDY TIDAL COAST TOURIST REGION
SAINT JOHN RIVER VALLEY / FUNDY TIDAL COAST TOURIST REGION BOUNDARY
LOWER SAINT JOHN RIVER VALLEY TOURISM REGION - STUDY AREA BOUNDARY

FIGURE 1: STUDY AREA BOUNDARY OF THE LOWER SAINT JOHN RIVER VALLEY TOURISM REGION

York County to the Mactaquac Dam and Saint John County to the Reversing Falls. As such, the Study Area includes portions of two of the six tourist regions defined by Tourism N.B., the Saint John River Valley and the Fundy Tidal Coast tourist regions.

Figure 1 presents a map showing the Saint John River Valley and Fundy Tidal Coast tourist regions and the Study Area for this study - the Lower Saint John River Valley Tourism Region - which overlaps both of these tourist regions.

While the cities of Fredericton and Saint John provide prominent destination nodes at the upper and lower boundaries of the Study Area, the Terms of Reference excluded the City of Saint John from the focus of the region's tourism development plan. However, Saint John's importance to the region as a destination, attraction and tourist service centre preclude its exclusion from most elements of this study. Consequently, several elements of the region's tourism development include consideration of the City of Saint John.

1.5 Report Format

This report presents the final results and recommendations for a tourism development strategy and implementation plan for the Lower Saint John River Valley Region. An **executive summary** of the strategy and plan is presented in **Chapter 2.0.** **Phase I** of the study is outlined in **Chapter 3.0**. It contains a summary of:

- key observations regarding the region's existing inventory of tourism attractions, activities, facilities and accommodations; and

- identification of the Region's past, present and prospective future tourist markets and levels of demand.

A much more comprehensive and detailed analyses of Phase I items are included in the Background Resource Report entitled: **The Lower Saint John River Valley Tourism Development Study - Phase I Background Document**.

The remainder of this report is dedicated to **Phase II** of the study. This includes:

- an evaluation of existing tourism in the region. This provides a basis for formulating a tourism development concept and marketing framework in keeping with the aspirations of the residents of the Lower Saint John River Valley Region **(Chapter 4.0)**;
- a basic statement of the tourism development strategy **(Chapter 5.0)**;
- a detailed listing of potential tourism development opportunities. This includes an evaluation of each opportunity in terms of its components and strengths. This is followed by an assessment of these opportunities with respect to market and financial factors as well as their regional tourism impacts and economic impacts **(Chapter 6.0)**.
- a proposed set of tourism marketing initiatives necessary to fully develop the potential opportunities identified **(Chapter 7.0)**;
- an implementation plan including priority groupings of the various product development opportunities and marketing initiations. This plan also provides an indication of preferred scheduling for development opportunities and marketing initiatives **(Chapter 8.0)**; and

- an economic impact assessment of the net benefits from expenditures and employment generated by the prospective tourism projects and marketing initiatives **(Chapter 9.0)**.

EXECUTIVE SUMMARY

2.0 EXECUTIVE SUMMARY

Key Elements of Strategy

This report presents a tourism development strategy (including an implementation plan) for the Lower Saint John River Valley Region (LSJRVR). Prioritized sets of tourism improvements, both development opportunities and marketing initiatives, have been established to bring the LSJRVR up to the provincial average level of tourism activity in the next 5 years.

Economic Impacts of Tourism

The tourism industry in the region has a major impact on the local economy. At present, annual direct expenditures on tourism activities in the LSJRVR are approximately $85 million. These current direct tourist activities result in **an annual total for the region of $140 million in direct, indirect and induced expenditures. This creates 2,390 person-years of employment**. However, the LSJRVR tourism industry currently performs about 30 percent below the provincial average level of tourism activity. The recommended strategy of developments and marketing initiatives presented in the 5 year implementation plan should increase the region's tourism performance to a level equal to the provincial average. **This would lead to total expenditures of $182 million annually in direct, indirect and induced expenditures and to 3,106 person-years of annual employment created in the region as a result of the tourism industry.**

To accomplish these economic benefits, the region needs to build upon and promote its strengths, while mitigating its weaknesses and rectifying its deficiencies.

Region's Strengths

The region has many notable tourism strengths - its heritage and cultural sites, a beautiful unspoiled inland river system, the pastoral valley setting, and a diverse arts and crafts community, to name a few. However, these tourism assets have gone relatively unnoticed by tourists passing by the region. This can be attributed to the general underdevelopment of appropriate facilities and services and the lack of promotion of the tourism offerings.

Region's Weaknesses

Several general weaknesses and deficiencies of the region must be resolved prior to achieving higher levels of tourism activity and benefits. A successful development strategy for the region must provide for the following:

- river access and viewing improvements;
- highway and marine infrastructure improvements;
- identification, organization and packaging of outdoor recreational, heritage and cultural resources;
- expansion of the base of available attractions and activities;
- expansion and upgrading of the quality of tourism services, accommodations and foodservices;
- increasing market awareness of the region; and
- coordinating, organizing and focussing marketing efforts of the region.

Focus of Strategy

The proposed development strategy recognizes that response to these challenges must also be cognizant of the environmental and cultural integrity of the region. Developmental goals and objectives have been established to serve as guidelines to proper choice and application of development opportunities and marketing initiatives. Input received from the public meetings held throughout the region and that received from the Steering Committee were consistent in confirming a strong desire to achieve **"Success Without Excess"**.

Goal of the Strategy

Proposed tourism improvements emphasize enhancement of the natural, historic and cultural attributes of the region. Large man-made attractions are not considered compatible with the focus of tourism development, particularly in rural areas of the region. **The general goal for tourism development in the LSJRVR is to expand the tourism industry in a manner which enhances the cultural, environmental and economic well-being of the region.**

Selection and evaluation of the tourism improvements, both development opportunities and marketing initiatives, proceeded on the basis of objectives associated with each of the cultural, environmental and economic components of the above noted strategic goal. A total of **36 tourism development opportunities and 24 marketing initiatives** have been identified for planning, approval, construction (where appropriate) and operation during a 5 year implementation period. Each tourism improvement was assigned to a priority group depending on its relative ability to satisfy the region's developmental objectives and ensure a logical and constructive sequence of development.

Product Development Opportunities

Table 2.1 presents the **development opportunities** in each of the following four priority groupings.

- **Priority Group I** contains **key** infrastructural and service **developments necessary** to improve the primary product and make the region a desirable **destination area**.

Table 2.1

PRIORITY GROUPINGS FOR TOURISM DEVELOPMENT OPPORTUNITIES*

Priority Group	Description of Opportunity**
I	Scenic Touring Route Designation (#1)***
	Scenic Touring Route Improvements (#2)
	Improve Boating Facilities (#5)
	Bed & Breakfast Accommodations (#10)
	Upgrading Accommodations Facilities (#11)
	Upgrading Foodservices (#12)
	Major Hotel Accommodations (Fredericton) (#17)
II	Sport Fishery Development (#7)
	Downtown Improvement Programs (#8)
	Natural Habitat/Protected Areas Viewing Facilities (#9)
	Hartt Island Waterbased Amusement Park (#15)
	Oromocto Riverfront Accommodations (#18)
	Riverboat Replica (#29)
	Marco Polo/Historic Village (#30)
	Tour Boat(s) (#31)
	Heritage Attractions - Gagetown (#33)
	Resort Hotel/Marina Complex (#35)
III	Hiking Trail System - Linear Park (#3)
	Summer Theatre Program (#13)
	Summer Crafts Program (#14)
	Poley Mountain - Night Skiing (#20)
	Meeting and Banquet Facilities - Sussex (#22)
	Covered Bridges Sites (#23)
	Long Reach Camping Facilities (#28)
	Historic Coal Mining Village (#36)
IV	Bicycle Route Network (#4)
	Canoeing Facilities (#6)
	Local Industry Exhibitions - Sussex (#21)
	Henderson Brook Beach (#24)
	Westfield Common Pavilion (#25)
	Westfield Beach (#26)
	Victoria Beach (#27)
	Mount House Tours (#34)

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* These groupings do not include some of the opportunities noted in Chapter 6.0 (only 33 items versus 36 items detailed in Chapter 6.0). This is because some of the items relating to waterfront improvements in Fredericton and Oromocto and the Partridge Island opportunities have not been included in this summary. These items were the topic of separate, detailed feasibility studies. Implementation of the components of these items should be done in accordance with the implementation plan for each of the respective studies. To a large extent, the same applies for the major boating facility items as that topic has also been covered by a separate, detailed study. However, this current study has also considered several recreational boating enhancements, in particular, specific items not addressed in the earlier study (eg. small trailerable craft, canoes, etc.). Therefore, this item is included in this chapter.

** For additional details regarding each opportunity see Chapter 6.0.

*** The numbers after each opportunity are the numbers assigned to the more detailed descriptions of this opportunity in Chapter 6.0.

- **Priority Group II** developments relate to specific operations and services which **substantially expand on the attractiveness** of the region.

- **Priority Group III** developments provide **supplementary** infrastructure and services **which enhance** the attractiveness and desirability of the region.

- **Priority Group IV** developments provide other **complementary** assets which **support the general thrust** of the policy **but individually have a lower direct impact and less urgency**.

The total capital cost of these development opportunities is estimated to range between $47 million and $62 million (1988 dollars). The capital expenditures associated with private investment opportunities comprise between $38 million and $50 million of the total, while public expenditures total from $9 million to $12 million. If the average total of these capital costs ($54.5 million) is used, total construction expenditures impacts of $86 million and construction employment of 986 person-years would take place during the 5 year implementation period. It should be noted that these impacts exclude the positive capital impacts of development opportunities included as part of other previous studies of: a). primary recreational boating facilities; b). riverfront development opportunities along the waterfronts in Fredericton and Oromocto; and c). expansion of Partridge Island.

All of these have had separate detailed studies which addressed the needs and impacts of these specific areas. The above estimates also exclude the Marco Polo Historic Village development for which a separate, detailed feasibility study is about to be undertaken. Similarly, the costs of a potential historic mining village on Grand Lake near Minto have not been fully developed. All such impacts would be in addition to the values noted above.

Marketing Initiatives

Table 2.2 presents the **marketing initiatives** in the following priority groupings.

- **Priority Group I** initiatives are **fundamental** to marketing the region and to the organization, coordination and implementation of marketing programs.
- **Priority Group II** initiatives are those which should be pursued subsequent to the higher priority development opportunities. These initiatives **have a more moderate influence** on regional tourism.
- **Priority Group III** initiatives are those which relate to **limited geographic areas and have less impact on a regional basis**.

The estimated one time and recurring cost of setting up and implementing these marketing initiatives over the 5 year implementation period is $850,000. This would result in a total direct, indirect and induced expenditure impact of $1.4 million and an employment impact of 24 person-years.

Net Annual Positive Impacts on the Economy

Upon completion of the implementation plan, the Lower Saint John River Valley Region should be able to achieve the provincial average levels of tourism expenditure activity. This would increase the present level of tourist expenditures of $85 million per annum by 30 percent to $110.5 million per annum (1988 dollars). The additional or net increase in direct tourist expenditures of $25.5 million per year would be a direct result of the tourism activity stimulus produced by the proposed development opportunities and marketing initiatives in this report. The

Table 2.2

PRIORITY GROUPINGS FOR MARKETING INITIATIVES

Priority Group	Description of Marketing Initiatives*
I	Full Time Marketing Manager (#1)
	Single Focused Theme (#2)
	Targeted Priority Markets (#3)
	Coordinated Marketing Information System (#4)
	Tourism Road Signage (#5)
	Industry Training Programs (#15)
	Public and Industry Awareness Programs (#16)
	Promote Region Through Strategic T.I.C.'s (#17)
II	Specialized Travel Packages (#6)
	Promotion of Local Products (#7)
	Boating Strategy (#8)
	Historic Building Recognition (#9)
	Heritage Home and Garden Tours (#10)
	Ancestral Registry (#11)
	Existing Natural Habitat/Protected Areas (#12)
	Winter Brochure(s) (#13)
	Relocate the Fredericton Westbound T.I.C. (#18)
	Heritage Walking Tour Enhancements (#19)
	Sussex Write-up (#20)
III	Promote Sussex Winter Activities (#21)
	Promote LSJRV and Fundy Coast in Sussex (#22)
	Market Tours of Gagetown to Special Groups (#23)
	Promote Sports Fishery Opportunities (#24)
	Monitoring System (#14)

* The numbers after each marketing initiative are the numbers assigned to this opportunity in **Chapter 7.0**.

level of net **increased direct tourist expenditures** will in turn create a total of **$42.0 million per annum** of net direct, indirect and induced expenditures in the region. Similarly, there would be a total **net increase of 717 person-years** of permanent direct, indirect and induced **employment** created and retained annually thereafter in the region.

Implementation Committee

A key component of this strategy is the need for a full-time marketing manager for the Lower Saint John River Valley Promotion Association. In light of the nature of this strategy, the emphasis on preserving the unique natural character of this region and the important subtle issues underlying many elements of the strategy, it is also recommended that an Implementation Committee be established. Because of the many subtle issues inherent in this strategy, it is important that the Implementation Committee membership include several of the individuals who served on the Steering Committee for this study. The committee should include representatives of the Department of Tourism, Recreation and Heritage, the Department of Regional Industrial Expansion, the Lower Saint John River Valley Promotion Association, municipal representatives and industry representatives.

SUMMARY OF PHASE I

TOURISM INVENTORY AND MARKETS

3.0 SUMMARY OF PHASE I - TOURISM INVENTORY AND MARKETS

3.1 Introduction

This chapter presents a **summary** of the major findings of **Phase I** of this tourism study of the Lower Saint John River Valley Region (LSJRVR). A detailed analysis of the LSJRVR tourism industry inventory and markets is found in the background report entitled: **The Lower Saint John River Valley Tourism Development Study - Phase I Background Document**.

This summary of the major findings of Phase I of the study includes information on the following four components of the LSJRVR tourism industry:

1. goals and objectives of the LSJRVR tourism industry;
2. tourism endowments of the LSJRVR;
3. tourism support infrastructure of the LSJRVR; and
4. current promotion of the LSJRVR tourism industry.

The goals and objectives of the LSJRVR tourism industry have been confirmed by input from the Steering Committee and the input received from the series of public meetings held throughout the region at the end of Phase I. These **goals and objectives** are an integral part of the basic tourism development strategy statement which is presented in **Chapter 5.0**. The remaining three of the above components have been summarized in this chapter in a common format which includes the following:

- the general inventory of existing tourism elements are outlined for each tourism industry component in the LSJRVR;
- the primary, past and present consumer/visitor markets for these tourism industry elements are identified; and
- the implications with respect to the quality and extent of the LSJRVR's tourism inventory elements are presented; the past, present and prospective future tourism market performance of the region are noted; and deficiencies and development improvements to the region are briefly highlighted.

3.2 Tourism Endowments

Tourism endowments of a tourist region are the natural and man-made attributes which draw tourists to the region. They may include natural tourist attractions such as the Reversing Falls, or tourism activities and facilities such as guided tours, riverboat cruises, historical buildings and marinas. Often, man-made facilities and organized activities complement the natural, physical or cultural attributes of a region. Others may be well planned and designed facilities which create their own attraction independent of the surrounding natural environment. In combination, they produce a tourism product, which is unique and identifiable to the region.

The following sections provide observations on the tourism endowments of the region.

3.2.1 Natural Physical Attributes

The physical features of the LSJRVR - the slowly flowing and meandering river system's aquatic beauty, the valley's wetlands and wildlife habitant, the pastoral image and pristine scenery - present a solid foundation for tourism in the region. This has strong appeal to several segments of the tourism market. The region is well situated and accessed by the American auto touring market via Route 1 from the St. Stephen/ Calais border crossing and by the Trans Canada Highway (Route 2) from the Woodstock/Houlton border crossing. It is also directly accessed by the Atlantic and other Canadian markets via the Trans Canada Highway.

Over half of all out-of-province, overnight tourists have cited their primary purpose to be sight-seeing. About 20 percent of all out-of-province visitors stay in the LSJRVR, while an additional 10 percent stay in the City of Saint John. Ontario and American visitors comprise over 60 percent of all out-of-province visitors to the region.

Although the region is well exposed to tourist traffic, many tourists pass through the region on their way to other destinations. Typically, tourists to the region stay for shorter periods of time and make fewer repeat visits than those visiting other areas of the province. So, while the region's natural beauty is its major attraction, more tourist facilities and activities appear warranted if tourists are to be retained longer and attracted back to the region.

Direct access, or sight lines, to the LSJRVR's many scenic vistas are not readily available to the touring public. In many locations foliage along the riverside routes has grown up to the stage where it obstructs views while driving; few roadside pull-off viewing points exist along the river routes. Many areas with the most scenic views of the LSJRVR are not visible to the auto touring market, so tourists tend to drive through or by the region to other destinations.

Effluent discharges into the river system from private, municipal, commercial and industrial activities should be reduced. Preservation and enhancement of water quality is critical to the region. The importance of this concern for the environment should be kept at the forefront by all private and government groups involved with activities in the river region. Although substantial efforts have been made in the past several years to reduce discharging of effluents into the river, there are still some locations where untreated effluents are discharged. The areas where discharge of effluents appears most critical are Gagetown, Douglas Harbour and Saint John. Appropriate technical assessments of the nature and extent of unacceptable discharges are required and mitigating measures should be taken to protect the environment of the region.

3.2.2 Climate

The climate of the LSJRVR is divided into two seasons for tourism planning purposes:

1. **Winter Season**: approximately mid-November to mid-April; and
2. **Summer Seasons**: made up of the "Spring shoulder" season from mid-April to the end of June, the "High Summer" season in July and August, and the "Fall Shoulder" season of September, October and early November.

Over half of all out-of-province visitors come to the region during the "High Summer" months, at which time swimming, boating and other summer outdoor activities are prominent.

The high concentration of tourist visitation during the two summer months of the year subjects the viability of many tourism businesses to a highly peaked and intensive seasonal operation. Winter tourist activity in the region is primarily special events oriented drawing from a local or provincial market. Recent years have witnessed considerable growth in the motorcoach tour market in the region during the "Fall Shoulder" season, although much of this has actually been to the cities of Saint John and Fredericton.

A major challenge for present and future tourism businesses of the LSJRVR is to expand their operations into the spring and fall shoulder seasons, and to offer winter season services. This may not be practical nor possible in many cases, as most tourists seek vacations which offer them "Sun, Sea and Sand". However, opportunities to tap specific market segments during the off-peak tourist seasons exist, such as:

- the seniors motorcoach market in the summer shoulder seasons;
- the touring market, from the southern United States during high and shoulder summer seasons seeking cooler climatic conditions; and
- winter resort packages offering alpine skiing (at Poley Mountain), cross-country skiing, sleighrides, ice-fishing, outdoor skating, etc.

3.2.3 **Human Resources**

Over three-quarters of the Lower Saint John River Valley labour force are employed in tertiary industries, ie. the service sector, with a low proportion employed in primary and secondary industries. This service industry focus is conducive to the tourism sector. The low industrialization of the region makes available service-oriented labour and avoids distracting heavy industry, while maintaining the region's unique pastoral character.

The LSJRVR population is predominantly Anglophone with relatively few bilingual residents and only 5 percent Francophone. A considerably lower percentage of Quebec tourists visit the area in comparison with other parts of the province. If the Quebec market is to be promoted and sought after, more bilingual services will have to be offered in the region.

The Maritimes are well known for being friendly and hospitable, which is attractive to residents from more populated and less personable urban areas. However, the hospitality skills of those serving tourists are typically not as well developed in this region. Resident tourism-related industry workers tend to underestimate the beauty and scenic offerings of the region, or are unaware of the region's history and its tourist facilities and activities. Tourism awareness programs for residents and regional training programs for "frontline hospitality" employees could improve the marketability of the region and encourage higher activity and extend the length of stay of tourists visiting the region. As a result, service industries in the LSJRVR could become more profitable and the region's economy significantly improved.

3.2.4 **Heritage and Cultural Facilities**

There are numerous heritage and cultural facilities located throughout the Lower Saint John River Valley Region. They include museums and archives, historical buildings and forts, historical churches and cemeteries, covered bridges, art galleries and craft shops, outdoor and indoor theatres, farmers' and flea markets.

Although heritage and cultural facilities alone typically attract a relatively narrow and small tourist market, they do provide interest and entertainment to a much larger spectrum of the tourism market. Auto touring markets rate heritage and culture related activities and shopping for arts and crafts quite highly among their preferences for vacation activities.

Heritage and culture are also rated very highly by the cruise market. While the City of Saint John is presently not a regular port-of-call of cruise ships, this potential market exists and is well suited to the attributes of the LSJRVR. The region would assume a secondary role in accommodating these tourists' cultural and heritage interests through side day-tours into the region from Saint John. Similarly, land based groups visiting Fredericton could provide a basis for day-tours to the rural portions of the region.

The LSJRVR's heritage and cultural facilities have added appeal to the private recreational boating market (ie. resident and non-resident boaters with conventional sail and power vessels, as well as houseboats). These features are also attractive to the seniors and motorcoach tour markets.

Although heritage and cultural facilities are perhaps one of the LSJRVR's greatest strengths, very little packaged information is available outside of the cities of Fredericton and Saint John, to make tourists aware of these facilities. There are limited guide books or tour packages for historical buildings and other heritage features. The same applies for directories for art galleries, museums, craft shops, etc., available to tourists visiting the region.

3.2.5 Tourist Attractions, Facilities And Activities

Fundamental to the tourism endowments of the LSJRVR are the range of tourism attractions, facilities and activities available to tourists. Tourism facilities and attractions include marina and wharfage facilities and good anchorage locations for recreational boating, alpine ski hills, golf courses, harness racing tracks, riverboat cruises, guided tours, various natural attractions (eg. Reversing Falls), family tourist amusement facilities (eg. Hartt Island Campground and Animaland), and hunting and fishing establishments or camps. Various commercial and non-commercial tourism activities are also available in the Region, which include cross-country and alpine skiing, snowmobiling, bird watching, ice fishing, canoeing, houseboat rentals and yacht charters, sailing schools, arts and crafts workshops and farm vacations. In addition, each year brings an extensive line-up of special events offered throughout the winter and summer tourist season.

Some tourism business developments and activities in the LSJRVR have developed in line with the region's primary strength--its river and natural pastoral setting. Out-of-province tourists visiting the region show higher than average participation in sailing, canoeing and other boating related activities. A considerable recreational boating market exists in the New England states which are in close proximity to the LSJRVR. However, upgrading and expansion of marinas and wharves should proceed in parallel with promotion of the LSJRVR to ensure this market is properly accommodated when they reach this region.

Bird watching is becoming a very popular hobby in North America. With the vast amounts of protected wetland areas designated along the river valley and numerous bird species indigenous to the area, this activity may become a considerable attraction to the region.

Major commercial tourist ventures of the carnival and entertainment variety have been avoided throughout most of the region. Residents do not want "tacky" commercial tourism developments cropping up throughout the region. On the other hand, there is a deficiency of family entertainment facilities in the region. Tastefully selected family attractions offering a place to go during inclement weather are needed in the rural areas of the region.

3.3 Tourism Support Infrastructure

It is not enough for a tourism region to offer tourist attractions, facilities and activities. Extensive tourism support infrastructure are required to serve the travel and accommodations needs of tourists to attract, guide, feed and accommodate them during their stay in the region. Tourism support infrastructure includes privately operated overnight accommodations and food and beverage establishments, as well as publicly operated parks, beaches, picnic grounds, tourist information centres, signage, and a transportation network. These infrastructures help facilitate a pleasant and relaxing experience for tourists (without enduring mishaps or anxieties during their visit). They also can become an attraction of the region, when properly presented and maintained.

3.3.1 Private Support Infrastructure

Privately operated accommodations and food service establishments provide essential support services to tourists within the region. They are also the major beneficiaries of an active tourism industry. While tourists may not come to a region specifically to utilize an accommodation or restaurant, the lack of availability, or quality, of such services may prevent them from coming, or returning. In addition, while accommodations and restaurants normally provide a tourism support function, it is possible for their excellence to become a tourist attraction through reputation and return visits.

The LSJRVR has both roofed and campground accommodations available for tourists. There are over 100 roofed accommodation establishments in the region, of which about three-quarters are hotel or motel accommodations. The rest are made up of bed and breakfast, farm vacation and country inn establishments. In total, 3,134 roofed accommodation units are available in the LSJRVR. Most are operated year-round and are located in either Fredericton or Saint John. About one-quarter of the units available outside the cities are only operated in the summer and its shoulder seasons. The region offers a mix of quality hotel/motel units (primarily in the cities) and smaller, low budget, motels and country inns. There is also an expanding supply of unique, personal service bed and breakfast and farm vacation accommodations.

There are 19 private campgrounds available in the LSJRVR providing a total of 2,327 campsites. Most sites are serviced with at least electrical hookups. Typically, private campgrounds operate from mid-June to mid-September.

There are more than 315 food service establishments located throughout the LSJRVR, although over three-quarters of them are either in Saint John or Fredericton. About one-quarter of all restaurants are fast food outlets, two-thirds are midscale restaurants with seating, and the rest are dining establishments. Only three dining restaurants are available in the region outside of the two cities.

Although campers tend to stay longer in the region, a greater percentage (about one-third of the total) stay in hotels or motels and it is the latter who spend more per stay. About one-third of all visitors to the region stay with friends and relatives; their expenditures are relatively less, and are directed to such non-accommodation expenditures as tourist activities and gifts. Resident New Brunswick visitors to the region are more likely to stay with friends and relatives and have lower expenditure patterns than out-of-province visitors.

Fredericton's roofed accommodation occupancy rates have typically exceeded the provincial average in all seasons, particularly the summer shoulder and off-tourist seasons. This is likely due to government business related accommodations demand. The rest of the region tends to have occupancy rates slightly lower than the provincial average. Overall, the region's roofed accommodations generally are over three-quarters occupied during the summer tourist season. During the shoulder seasons, from half to two-thirds are occupied, and during the winter season less than half of all units are occupied. The larger establishments (50 plus rooms) outperform smaller establishments by a fairly wide margin in attracting occupants.

Although no data are available, private campground operations appear to be fairly well utilized. However, a considerable portion of private camp sites are dedicated for the entire tourist season to local area residents who leave a travel trailer at the site for use essentially as a cottage.

There is no first class hotel facility in Fredericton. This has dampened the market demand for meetings and conventions, below that which would be expected of a provincial capital and university centre.

Most roofed accommodations have a lacklustre quality to them, a reflection of their relative age and the price sensitivity of the market in which they operate. In fact, the relatively low revenue levels thwart an operator's ability to expand and renovate.

Bed and Breakfast, farm vacation and country inns are well established as an informal network of non-conventional roofed accommodations, particularly in rural portions of the LSJRVR. While presenting relatively few rooms to the travelling public, they provide a positive image congruous with the region and make a major contribution to the accommodations supply during the main tourist season. Guests of these facilities are likely responsible for a large proportion of expenditures at local galleries, craft shops, antique shops, etc. Therefore, they represent an almost ideal way to expand the region's accommodation base. However, bed and breakfasts are often not able to to accommodate motorcoach tours, families with children and the transient non-reservation traveller.

There is no resort accommodation available in the region. An opportunity to tap the resort market exists, if a good location and proper product mix (eg. spas, marina, tennis, etc.) is developed.

Foodservice facilities in the LSJRVR, either in conjunction with accommodations or stand alone operations, generally lack the capacity and quality to provide a first class day touring destination or to feed a motorcoach touring party for a meal stop.

3.3.2 **Public Support Infrastructure**

The federal, provincial and municipal governments all have a variety of roles in providing the various infrastructure which serve residents and tourists. Direct tourism support infrastructure are provided in the form of provincial and municipal parks, picnic areas, public beaches and tourist information centres. Indirect tourism support infrastructure are provided by the governments in the form of a transportation network---highways, railways, airports, public wharves, cable ferries, covered bridges, highway routings and community boundary and tourism signs.

There are four provincial parks, five public picnic sites and five public beaches, in addition to four provincial and seven municipal Tourist Information Centres in the LSJRVR, which provide direct public support to the tourism industry. There are 4 arterial, 7 collector and numerous local highways, 2 airports, 1 passenger rail service, 25 covered bridges and 9 toll-free ferry services in the LSJRVR, which indirectly provide public support to the region's tourism industry.

A unique feature of the LSJRVR transportation infrastructure is the presence of toll-free ferries and numerous operational covered bridges, which cross the Saint John River and many of its tributaries. Although the ferry facilities provide a crucial river crossing function in the region's transportation network, they are also perhaps one of the most unique attractions offered by the region to tourists. The same may be said of many of the covered bridges, which are particularly prevalent in the Hampton, Norton and Sussex areas.

Highways and tourism signage standards are set by the province and are presently under review. The present scenic route program with the "camera" symbol is recommended for replacement by the use of symbols unique to each of the six tourist regions. While this change offers some improvement in identifying particular regional routes, the designation of routes to the six tourist regions complicates identification of the LSJRVR under study. The LSJRVR is composed of the lower portion of the Saint John River Valley Tourist Region, as well as the King's County and the mouth of the Saint John River portions of the Fundy Tidal Coast Tourist Region. Therefore, the existing and recommended signage policies do not appear to permit highlighting of the LSJRVR and its scenic routes independently.

Although Route 1 from the United States Border and the Trans Canada Highway (Route 2) provide direct highway access to major Canadian and American tourist markets, they circumvent most of the more scenic portions of the Lower Saint John River Valley. Good roadside signage and promotion are required to prevent these tourists from simply passing by to other Atlantic Region destinations.

Many other improvements to the public tourism support infrastructure are required. For example, there is a deficiency of public beaches and roadside scenic area pull-outs. In some cases, roads are deteriorated to low levels of riding comfort, while narrow unpaved shoulders discourage scenic viewing by motorists and cycling activity along the river valley is made very difficult. Views to motorists are often obstructed by tree and brush growth along the highways.

Improvements to these basic support infrastructure would allow development of day-tour drive packages along, and criss-crossing, the river. Such improvements would allow tourists to actually see the scenery with comfort and safety and greatly enhance the overall attractions of the region to potential tourists, and thereby **entice them to come to the region as a destination, not just a pass through area**.

3.4 Tourism Promotion

The two primary tourism agencies of the LSJRVR are the Lower Saint John River Valley Promotion Association (LSJRVPA) and the New Brunswick Department of Tourism, Recreation and Heritage (NBTRH). Fredericton and Saint John have their own promotion agencies, the Visitor and Convention Bureaus. The LSJRVPA is a self-funded, volunteer, non-profit organization that produces tourist brochures for distribution to visiting tourists and video packages for presentation at boat-shows, tourism conventions, etc.

NBTRH promotes the province as a whole outside of New Brunswick and the six tourism regions are given equal promotion. It also produces several brochures, guide books and audio visuals for the province as a whole.

Overall, there is a low market awareness of the LSJRVR as a tourist destination area. This stems partly from lack of coordination among tourism marketing organizations (ie. Saint John, Fredericton, LSJRVPA and NBTRH) with, until recently, each agency going their own way. Unclear and unrepresentative images, such as "Come to the Sea", are portrayed which are detrimental to the characterization and promulgation of the LSJRVR.

Very little packaging of activities and accommodations are available. No market research and information systems have been developed to focus promotion on appropriate tourism markets and development of business opportunities. Promotional materials vary in quality and lack regional distinction and uniformity.

Prospective tourist markets have been missed due to the lack of tourist awareness of the LSJRVR, and the lack of coordinated and directed promotional effort by the region.

EVALUATION OF EXISTING TOURISM

4.0 EVALUATION OF EXISTING TOURISM

4.1 Introduction

For those who know the region well, the Lower Saint John River Valley both excites the imagination and calms the spirit. The river alternately beckons one to follow its large, sweeping curves or invites the traveller to wait, pause a while and enjoy its powerful and timeless views. These are powerful strengths, yet they are challenging to package. These strengths are a product of the long process of time and history. They are delicate and vulnerable as the forces of new development increasingly impinge on the pristine character of the rural scenes along the river.

The Lower Saint John River Valley has many attributes of a scenic tourist area yet its potential has been difficult to realize. Many individuals, recognizing the numerous strengths of the Lower Saint John River Valley have contributed personal time, efforts and funds to develop the area's tourism potential. Of late, these efforts have been channelled primarily through the Lower Saint John River Valley Promotion Association. Many people who keenly appreciate the quality of this area wish to share its beauty with travellers by **having the region clearly established as a tourism destination area**. At the same time, these individuals are equally convinced that tourism attractions and activities should not be of the type, or reach the stage of development, where they would substantially detract from the character of the region.

At the present time tourism represents a significant opportunity for the Lower Saint John River Valley Region to establish an enlarged economic base while at the same time preserve its unique character. To achieve this goal, a broadly based plan of action for directing tourism development is required. This action plan, or strategy, for tourism development has been formulated based on careful review of many factors. To set the stage and appreciate the rationale for the tourism strategy presented in **Chapter 5.0**, it is important to provide an overview of the existing situation and factors which impact directly on the development strategy. This overview is provided in terms of:

- a product overview;
- a market overview; and
- highlights of key development issues.

4.2 Product Overview

The Lower Saint John River Valley has an abundance of unspoiled natural physical features that appeal to visitors and residents alike. The physical characteristics of the region present a timeless image, becoming of New Brunswick's reputation as **"The Picture Province"**. However, regardless of these natural endowments, the region's tourism infrastructure is relatively underdeveloped. Consequently, the region faces the difficult task of developing a commercially viable tourism industry and associated support infrastructure while preserving its natural attractiveness and integrity.

It is clearly evident that residents do not wish tourism development at any cost. Preservation of their environment, culture, heritage and quality of life are all given high priorities along with commercial development and economic growth. **"Success Without Excess"** may best exemplify the development approach to the tourism industry sought by residents of the Lower Saint John River Valley Region.

4.2.1 Strengths

On an objective level, the region exhibits the following strengths as a tourism product:

- A variety of heritage and cultural sites and communities (in both the urban and rural portions of the Study Area);
- A diverse arts and crafts community;
- The largest inland lakes and river system and protected waters for recreational boating in the Atlantic Region; this system is not

only unique to the Atlantic Region, but also to the entire northeast coast of the continent;

- Generally consistent warm summer weather which ranks among the best in the Maritimes;
- A strong fall season in terms of both colour foliage and the harvest activity;
- Large areas of pastoral landscape;
- River valley scenery which dominates the region and offers a tremendous variety of views;
- Access to the river by means of a system of provincially-operated ferries. Not only does this extensive ferry system provide direct access to the water, but it is available **free of charge**;
- Access to tourism markets via two major highway systems which directly link the region to the rest of the province, the New England states and the other Atlantic and central Canadian provinces;
- An extensive system of secondary roads and minor routes which provide for exploration and access to the above resources;
- A growing network of bed and breakfast facilities located throughout the region; and
- An outfitter industry which is well developed in the outlying areas of the region.

The area's strengths for tourism are largely potential strengths - the region is essentially underdeveloped in any planned manner. For those who live here, this may account for much of the valley's charm. For casual visitors to the region, however, many of these strengths remain little-known.

4.2.2 Weaknesses

From a tourism perspective, many of the area's strengths are offset by a variety of negative factors, including:

- Most visitors perceive the region as a pass-through area while en-route to other destinations;

- There are few major attractions or family oriented activities, even if these tourists were inclined to stop (although there is a diversity of smaller scale attractions);

- Outside of Fredericton and Saint John, recognized or designated heritage resources are lacking in the region (even though the resource exists in many areas);

- While the countryside is generally attractive, the available tourist services are limited. These limitations include:

  - a limited number of public beaches;
  - few scenic roadside stops or pull-outs;
  - narrow, unpaved shoulders discourage scenic viewing and cycling;
  - only a few communities offer pedestrian walkways suited to walking and viewing historic houses and public buildings;
  - foodservice facilities are extremely limited outside the cities of Fredericton and Saint John. This is especially true when considered from the point of view of individuals seeking a good meal, or of a coach tour seeking a mid-day stop (ie. quality and capacity);

  - foodservice facilities are not fully attuned to the rural environment or regional heritage; and
  - foodservices often do not emphasize the local cuisine or fresh agricultural products of the region.

- o Boating facilities are limited in extent and scope. Several facilities offer touring boaters little more than rudimentary services. For the small, trailerable craft, there is a serious deficiency in the availability of good launch ramps;

- o For the touring motorist, scenic quality is inconsistent. In addition to the lack of safe scenic view pullout spots, there are four main problems:

  - views are often blocked by residential development and/or trees and growth of underbrush;
  - in some areas the major highways offer limited views of the river (either the Saint John or the Kennebecasis);
  - many unsightly properties are found in pockets interspersed throughout what is otherwise a "scenic" area; and,
  - incompatible land uses (eg. clearcutting of forests and gravel pits) mar the landscape at a few locations.

- o Direct access to the river system is difficult for much of its length. The ferry system provides a notable exception as do the provincial parks. However, other forms of access are largely undeveloped (eg. pedestrian paths, hiking trails).

- o Tourism signs are typically of low quality outside the cities, the **"camera"** scenic route sign is inappropriate to identifying the character and attractions of the region's tourist routes. There are no Lower Saint John River Valley Region entry signs; many municipal identification signs are not tourism oriented and in some cases, ferry signs are relatively unnoticeable.

- No clear identity is given to the Lower Saint John River Valley Region. The Province treats it as part of the Saint John River Valley Region as a whole.

- Promotion of the region is focussed primarily on tourists already visiting the region; little external advertising to draw tourists to this Region is undertaken; although the "Come to the Sea" Provincial advertising program may be an appropriate overall image for the Province, it does not typify the Lower Saint John River Valley Region.

This list is not intended to be exhaustive or overly negative. These limitations can be recognized and responded to in order to improve the area's tourism product. In summary, while the area has a great deal of potential as a scenic touring region, its unique qualities must be enhanced and its negative elements eliminated, or reduced, to achieve a significant position in the province's tourism industry.

4.3 **Market Overview**

To acknowledge the existing and potential tourism markets most suitable for the region to pursue, the area's tourism product strengths vis-a-vis the various tourist market segments must be identified. This discussion highlights the process of product-market matching, which is at the heart of tourism planning.

4.3.1 **Auto Touring**

The auto touring market segment is the mainstay of the region in terms of exposure to tourists travelling on the major highways around the perimeter of the Study Area. Nonetheless, there is a curious dichotomy between this existing pattern and the region's development potential. The Trans Canada Highway (Route 2) and Route 1 define the northeastern and southeastern boundaries of the Lower Saint John River Valley Region. Services and communities along these highway corridors are generally oriented to short-term stopovers. Little effort has been expended to capture a portion of this large market passing by the region other than in the major centres. In addition to Saint John and Fredericton, Sussex enjoys a strategic location at the confluence of these two routes and has benefited from highway oriented commercial development.

The volume of tourist traffic found on these corridors significantly exceeds the capacity of the region to accommodate tourists on either the regional road system or in area dining and lodging establishments. Nonetheless, the area could benefit by attracting a portion of this tourist traffic from the highways.

In large measure however, the region is best suited to small, specialized market segments attracted to heritage and naturalistic appreciation activities. This potential is enhanced by the fall season which extends the peak season of activity. Hence, while the region's obvious market potential may be associated with the passing highway traffic, we suggest that this market segment is of only partial interest to the region. Instead, **a strategy of attracting individuals specifically to this area as a place to wander and explore at their own pace will ultimately prove more rewarding to communities and businesses within the region.** Succeeding in attracting too much of the high volume auto touring markets may only destroy the attributes which pulled them off the main road in the first place, without providing significant compensatory commercial benefits in return.

4.3.2 Outdoor Recreation Activities

The present scale of development of outdoor recreation in the Study Area is limited. Swimming, tennis, camping and hiking along with the more rigorous forms of outdoor recreation have not been fully developed. Other present and potential markets include cyclists, boaters, backpackers, fishermen, canoeists, bird watchers and horseback riders. In some cases, these activities can be developed around touring vacation packages (ie., boat cruises, hiking trails, etc.).

In general, most outdoor recreation opportunities in the region are individual or small group activities which cannot accommodate large numbers of participants. These activities can be readily packaged in terms of equipment (eg. bicycle rentals), routes (eg. overnight accommodation for a cycling tour or inn-to-inn cross-country skiing), and support facilities (accommodation, meals, etc.).

To further promote these forms of outdoor recreation, emphasis should be placed on developing systems and special facilities which can be used in an unstructured manner by different types of users (eg. hiking trail systems, bicycle routes, riding paths, cross-country ski trail systems). In this way, both auto tourers and overnight visitors can be encouraged to spend more time enjoying their stay in the region.

Winter activities are a different case as a large portion of the users can be expected to be drawn from local and regional markets. Hence, facilities appropriate to the tastes and temperament of Saint John, Fredericton and Moncton escape weekend markets would be appropriate. Activities such as a winter sleigh ride, natural ice skating, ice fishing and snow shoeing would support increased stays in area accommodation establishments. As the reputation of area Bed and Breakfast establishments grows, return business in shoulder and off-peak seasons may be attracted to some properties.

While suggesting these directions for developing the regional outdoor recreational attributes, there are instances where more traditional activities can be successfully pursued. Fishing, hunting, boating and canoeing activities are extensive from a local perspective and could be developed as packages in specific areas. Local sportsmen, however, may continue to resist increasing tourist exposure to these resources.

4.3.3 Resort Markets

A few city centre hotels are attracting escape weekend business on the basis of their indoor recreation facilities (eg. the Lord Beaverbrook Hotel and the Howard Johnson's in Fredericton) or on the basis of their location in relation to other centres of interest (the Hilton International Saint John at Market Square). However, a true resort based on extensive on-site recreation facilities (eg. golf, tennis, swimming) does not exist in the region. Given the high cost of developing these facilities as a resort, development opportunities for this market segment may be limited and warrants careful examination prior to commitment. Areas in adjoining regions of the province with existing recreation facilities (eg. Mactaquac Provincial Park and St. Andrews) may have a competitive advantage that is apt to remain. From a strategic viewpoint however, the region is well located in relation to New Brunswick's three major population centres of Fredericton, Moncton and Saint John to offer a "getaway" or "get together" resort product.

There may be some basis for developing a resort with specialized, weather proofed facilities (eg. an indoor health spa or small conference centre) which can counteract the challenges facing resort development in the region, namely:

- short summer operating season;
- primarily local and regional markets in the off-season; and
- high development costs for recreation facilities.

For resort development to be successfully undertaken in the Lower Saint John River Valley, a concept must be developed which could appeal to several different market segments in different seasons and at the same time create a unique market position in the province and the Atlantic Region. A resort development based around an exceptional marina complex and location, may provide a summer season anchor facility which would be unique to the province and region. Certainly, the viability of potential resort development would be substantially enhanced with a facility that takes advantage of as many natural attributes of the river valley as possible. At the same time, this would enhance the opportunity to maintain a reasonable volume of activity during the off-peak seasons.

4.3.4 Conference and Meetings Market

The conference and meetings market is considered primarily a provincial or Atlantic Region market (as opposed to the national market). This is due to infrequent air service to major national centres, the number of indirect flights to the area and the level of regional business activity.

On a regional basis, meetings are a highly competitive market as witnessed by the fact that the growing success of the Saint John Convention Centre has been hard won. Within the Study Area, this market would be restricted primarily to the cities of Saint John and Fredericton. The latter of which at present does not have a major meeting venue. Sussex also exhibits some potential due to its location equidistant from the three largest cities in this province.

Potential does exist to encourage conventions to participate in regional tours and attractions. Walking tours, or special guided tours such as those which exist in Fredericton, are activities which appeal to this market segment. Use of activities and facilities developed for the auto touring market can be encouraged and will assist in attracting small and medium scale meetings and conventions to the major centres of the region.

4.3.5 Boating, Tourboat Excursions and Cruise Ships

The private boating market has two primary components:

- the resident market of New Brunswickers who have their own cruising class boats based on the river system; and
- the non-resident cruising market.

Both resident and non-resident markets also present potential demand for charter operations for either conventional sail and power vessels as well as houseboats. From the perspective of maximizing the net impact on the provincial economy, the non-resident cruising markets from other provinces or the northeast United States are of prime interest. In particular, the cruising fleet of sailing and power vessels from the northeastern states is a key market segment worthy of substantial effort to penetrate.

The Saint John River system is a prime potential destination area for this New England cruising market. Specific features which appeal to this market are:

- This destination area is slightly farther away which provides an interesting coastal cruise through relatively challenging sailing and navigation conditions. The Reversing Falls is not envisioned as a deterrent. On the contrary, the reputation of this phenomena is one of the attractive features which lures these cruisers to the river region.

- The river system presents warm waters with secluded beaches and sandbars, which allow an opportunity for comfortable swimming. The river also generally provides a warm, fog free environment which is a contrast to much of the Gulf of Maine and Bay of Fundy coastal waters.

- People in the river area and, in particular, those associated with existing boating facilities have a reputation for being friendly, helpful and very hospitable.

- Most cruisers are particularly interested in the natural, uncluttered, unspoiled and undeveloped character of the river waterway in a rural and secluded setting. In fact, the long-term attractiveness of the river system to this boater market segment would be reduced if the facilities were overdeveloped and traffic volumes increased to the point where it became difficult to "get away from things".

Potential exists for additional cruising and boat charter activity on the Saint John River. The excursion and cruising market exhibits many characteristics of the auto touring market segment -- interests in heritage and culture, viewing unique features and areas, retail shopping and use of local restaurants and general interpretive appreciation tours typical of the outdoors recreation market segment.

Riverboats have been a significant part of the region's history. They provided the prime transportation services prior to the arrival of rail and highway facilities and actively continued service until the 1940's). One riverboat excursion tour is presently operating in Fredericton. The riverboat concept offers a potential product which would enhance the region's image and provide linkages to the auto and coach touring markets. Riverboat operations could involve short excursions and overnight trips.

Cruise ship vacations are a limited but growing market activity on the east coast. Saint John has some experience with this market segment. Initial efforts with this segment resulted in some difficulties resolving docking and customs problems associated with ocean going vessels. Assuming these logistical obstacles are overcome, this market offers a significant potential to the City and the region. Although most benefits to the Lower Saint John River Valley Region would be secondary, potential exists for side day-tours within the region by cruise ship clientele while in Saint John.

4.3.6 Heritage, Culture and Education Market

The growing interest in specialized courses, study vacations and cultural pursuits presents a range of market opportunities to the Lower Saint John River Valley Region. The University of New Brunswick campus could be one node of activity in a traditional approach to this market segment. The New Brunswick Crafts School represents a second potential focal point, especially if developed in conjunction with the smaller hotels and bed and breakfast facilities in Fredericton. A third level of activity could be generated throughout the region based on the growing network of bed and breakfast establishments. The Elderhostel program for seniors may be appropriate to all three levels.

While the heritage, culture and education market tends to have a lower expenditure pattern compared with auto touring, this market segment will respond to quality (including personal warmth and hospitality), well organized programs and well recognized labels (such as expert instructors with established reputations).

4.4 Key Development Issues

The present state of the region's tourism industry, while growing, can be considered to be underperforming. Most trips can be characterized as short duration stays which have targeted an area other than the lower river valley region as a primary destination. The potential exists to change these attributes.

One reason for optimism is the great interest which has been displayed on the part of many individuals to improve the market performance through cooperative advertising. In fact, much of the progress in the region to date has been the result of committed individuals developing specialized products and pooling limited resources. These efforts, while encouraging, have been somewhat uncoordinated and greatly underfunded.

At this point in time the effects of government involvement are beginning to appear. Increased marketing efforts have contributed to a rise in tourist volumes. However, product improvements have not yet been realized throughout the industry. Once the market's attention has been attracted, delivering a high quality tourism experience is of utmost importance.

In the final analysis, the four major issues facing the area's tourism industry are:

1). a need to expand the base of available attractions and activities;
2). lack of accommodations outside urban centres;
3). quality of accommodations and food and beverage facilities and services; and
4). low market awareness.

4.4.1 Lack of Attractions and Activities

This issue is directly related to the short length of stay and low expenditure pattern exhibited by the majority of visitors. Attractions are relatively few and in essence, the scenic quality is the most outstanding natural attribute.

Two difficulties are apparent with this situation:

- The region's appeal is limited among touring vacationers. It is particularly limited for the family market; and,

- Few opportunities exist to experience the region from other than by the area roads. Products are not developed for either the naturalist market or for the adventure/outdoor recreation market and only limited facilities are available for the recreational and tour boating market.

Historic and cultural attractions which one would expect to form a mainstay for the region have some unique characteristics:

- These attractions are concentrated in Fredericton and Saint John but also have a number of such attractions spread throughout the rural areas and small communities.

- While the area has a rich heritage, these resources are not identified or organized for public presentation. There is no overall guidebook. The Lower Saint John River Valley Tourism

Promotion Association map presents a wealth of general information but no specific details of the heritage attributes available in specific locations (such as Gagetown).

- Few of the heritage resources are programmed for tourists with either set hours for guided tours, films, etc. or printed maps and brochures pointing to the region's heritage facilities.

- Many of the communities are dispersed, suburban areas or very linear in nature and do not lend themselves to walking, biking or driving tours.

- The individual character of each community is sometimes difficult to capture in a tourist experience. A number of town histories have been published, although none are in wide circulation. There is also abundant opportunity for further historical documentation of the rural areas and smaller communities.

- Other heritage areas in New Brunswick offer extensive competition for the Lower Saint John River Valley. Furthermore, its competitive position is generally weaker in a locational sense. Motorists coming down the Upper Valley have direct exposure to a lot of river scenery before reaching the Study Area. This scenic exposure in the Upper Valley can be experienced without having to leave the main highway as is the case for most of the Lower Valley area. Some sites offer a definitive heritage experience which is not likely to be replicated in other locations (ie. Kings Landing).

4.4.2 Lack of Accommodations Outside Urban Centres

By far the bulk of rental rooms are available in Fredericton and Saint John (as was noted in the inventory and market summary in **Chapter 3.0**). Within the region, campgrounds are well distributed but are undistinguished. The bed and breakfast establishments scattered throughout the area offer a distinctive product but with a fixed, finite capacity. These smaller properties are not suited to unscheduled visits and individually they generally do not have the capacity to accommodate large numbers of touring vacationers (either auto or motorcoach). And, as indicated in **Section 4.3.3**, there are no true resorts in the region.

These limitations can be addressed by packaging trips out of the urban centres, thereby encouraging an additional nights stay. A second solution might be to encourage individuals to offer additional guest rooms as bed and breakfast's and farm vacations. These additions should be carefully monitored for quality. While this would add to the region's overall accommodations supply, these operators will experience the same marketing problems faced by existing operators.

Seasonality of demand is also a significant constraint: one can not build new rooms for summer occupancy only and turn a reasonable profit. To expand accommodations in the rural areas of the region, vacation packages (eg. combining room sales with selected activities) with some appeal to other markets outside of the summer season may be required. Potential examples include a spa, or a country inn with local and regional appeal or a mid-scale regional resort drawing from the markets provided by the three cities in Southern New Brunswick. A resort in the Belleisle Bay/ Washademoak Lake area is one potential project fitting these characteristics. At the lower end of the spectrum, a refurbished Eveleigh Hotel providing the facilities and services of a quality compatible with those of the Riverboat days would be an asset.

4.4.3 Quality of Accommodations Development and Foodservices

The quality of available accommodations within the region is an important factor affecting development of this region as a destination area. Generally, the product offered at area establishments is mediocre and few properties have been upgraded to 1980's standards. Largely built in the 1950's and 1960's, these motels, motor hotels and hotels reflect the tastes and standards of earlier times. Updating and upgrading are especially expensive given the present level of performance achieved in these businesses. It is difficult for owners to reinvest if returns will not be significantly higher than at present. This remains a long term problem requiring creativity and commitment from entrepreneurs and government agencies. Competition for the traditional markets has grown, especially from the leading chain-affiliated economy hotels such as Journey's End, etc. These new properties have entered the market place with a tasteful product at competitive prices.

The same concerns exist for the quality of foodservices provided by the tourism industry of the region. In many cases the quality of foodservices (both product and staff performance) and tourism operations services in general are less than acceptable if one expects to attract the visitor back for a return visit or to pass on a good reference to others. These deficiencies have to be addressed to expand penetration of all potential market segments. Operators only have to take a tour of their competitor's facilities along the coastal or inland zones of the New England States to see what is available to the same market they are trying to attract.

4.4.4 Low Market Awareness

Outside of the Atlantic provinces, the Lower Saint John River Valley is virtually unknown as a tourism destination area. The region's major centres do not have strong positive images either outside or within the province. Fredericton appears to be viewed as a small "c" conservative, small "p" provincial centre, while Saint John remains to be viewed as an unattractive industrial town to many Canadians, if they are familiar with either city. While the reality behind these images may have changed over the last few years, these unwarranted perceptions of the region's cities do not appear to have radically changed. Furthermore, since the awareness levels are low regarding both the centres and the region's capabilities as a destination area, most visitors are not motivated to stay for more than one night. Most visitors simply do not plan their trips around a stopover in the region.

Several reasons can be suggested as contributing to the region's present market awareness:

- **Lack of coordination among tourism marketing organizations**: Four groups are involved (Saint John, Fredericton, LSJRVPA, and N.B. Tourism) and, until recently, everyone appeared to be doing their own thing.

- **Unclear images**: New Brunswick's catch phrase, "Come to the Sea" presents some challenges for a region which is essentially inland and has no significant seashore. Fredericton's slogan "We've Been Expecting You" puts across a hospitable message but no strong image. Saint John has adopted "The Greatest Little City in the East" slogan which is catchy and begs some discovery. The Promotion Association for the Lower Saint John River Valley has portrayed a strong pastoral river valley image. As a result of these four images, one is not provided with a strong **overall sense of the river valley** as a tourist destination. Integrating these sub-images into a strong image for the region is required.

- **Lack of packaging**: Relatively few activity and accommodation packages have been developed which allow for innovative or focused marketing. With a successful package, the area could conceivably become known as **"the"** place to houseboat, explore, shop for crafts, absorb local heritage, etc.

- **Unfocused marketing and a lack of research**: With the exception of recent efforts by the Lower Saint John River Valley Promotion Association, marketing for the region seems to depend on the interests and outlook of the individual doing the promotion, whether it's for boating, bed and breakfasts, crafts, etc. An overall regional strategy, implementation schedule, budget and personal involvement plan would fill this void.

- **Poor market information and information systems**: Market data is typically provincial level information. No regular or standardized approach has been made to analyze or disseminate market information to inform industry operators about market trends, demographic profiles, activity preferences, etc. Similarly, no additional market data has been assembled at a provincial level.

- **Promotional material varies in quality**: Some promotional pieces are of a very high calibre while others exhibit less, or poor, quality. The overall problem is a lack of coordination which reinforces the region's indistinct market image. As well, in some cases the promotional material implies a higher quality product than actually exists.

  An example of a coordinated approach is the series of guidebooks produced by N.B. Tourism in 1988. The same quality, (minus the ads) should ideally be carried down to the Association level.

This creates two dilemmas:

- since the province does not currently recognize sub-regional associations, assistance for LSJRVPA activities is sporadic and almost unofficial;

- the Saint John River Valley Region offers at least two distinct products: the Upper and the Lower Valley sections. A single association does not represent the entire region.

TOURISM DEVELOPMENT STRATEGY

5.0 TOURISM DEVELOPMENT STRATEGY

5.1 Introduction

This chapter presents the strategy proposed for development of the tourism industry in the Lower Saint John River Valley. This is followed in **Chapter 6.0** by a detailed description and evaluation of the potential tourism product opportunities which support this strategy and will stimulate development of the industry in a manner consistent with the strategy. Other key elements of the strategy, including marketing initiatives, an implementation plan and an evaluation of their combined economic impacts are presented in **Chapters 7.0 to 9.0**.

5.2 Tourism Development Strategy

The basic strategy for tourism development in the region has evolved from the definition of the industry's prime goals and objectives. **The strategy is simply to develop a range of product opportunities and marketing initiatives which will best enable achieving the desired goal(s) and objectives for tourism development in the region.**

The regional goals and objectives for tourism development were established and confirmed on the basis of input from the Steering Committee and the Public Meetings held throughout the Study Area during Phases I and II of the project.

The **basic goal** for tourism development in the Lower Saint John River Valley Region is:

- **to expand the tourism industry in a manner which enhances the:**
    - **a). cultural;**
    - **b). environmental; and**
    - **c). economic well being of the region.**

Each of these three components of the overall goal have specific objectives. They are:

1. **Cultural Objectives:**

   - to ensure development that conforms to the aspirations of region's residents;
   - to enhance and preserve the heritage of the region's residents;
   - to develop a greater awareness of local history and heritage; and
   - to promote and stimulate the wealth of cultural arts and crafts indigenous to the region.

2. **Environmental Objectives:**

   - to ensure development that is not detrimental to the appearance and environmental attributes of the region;
   - to create an awareness of the unique character and natural attractiveness of the region; and
   - to protect and conserve environmentally sensitive areas.

3. **Economic Objectives:**

   - to increase the economic potential and employment opportunities of residents through tourism job creation;
   - to enhance the commercial viability of existing tourism enterprises;
   - to provide a public tourism support infrastructure which is conducive to growth of tourism markets and will support private development opportunities in the region;

- to stimulate private investment in tourism ventures in the region;
- to identify tourism development opportunities which strengthen and diversify the economic base of the region;
- to identify and locate attractions and services that support the tourism development of the region; and
- to extend the length and impact of the summer and winter tourist seasons.

There is a strong desire to achieve **"Success Without Excess"** in terms of tourism development within the Lower Saint John River Valley Region. There is a normal desire to enhance the commercial development and economic growth of the region through expansion of the tourism industry. However, there is an overriding consensus of opinion that this should not be done in a manner, or to the extent, that would jeopardize the region's environment, culture, heritage or general quality of life. These factors are all priority items in formulating future development within the region.

On the basis of the clear focus provided by the public input, the proposed strategy emphasizes enhancement of the natural, historic and cultural attributes of the region. Specific efforts have been made to expand on the natural and heritage strengths and pristine character of the rural, pastoral region as the focus for tourism development. At the same time, the type of developments proposed typically are small scale and in keeping with the character of the valley **(large man-made attractions are not considered to be compatible with the focus of tourism development for the non-urban parts of the region)**.

It is important to recognize the differences in the geographic areas of the study region in the context of how it relates to formulating appropriate tourism development opportunities and marketing initiatives. Essentially, **the Lower Saint John River Valley Region is viewed as a developing destination area with the following three distinct components**:

1). - gateway communities;
2). - a core area; and
3). - a peripheral area.

In addition, some development opportunities and marketing initiatives apply to the region as a whole. This format of regional and subregional components is used to address potential development opportunities and marketing initiatives appropriate to the distinct areas of the region and those common to all parts of the region.

The general descriptions of the three components of the study region are:

1). The **gateway communities** are the primary arrival and exit points for travellers to the Region. These three gateways (Fredericton/Oromocto, Saint John/Grand Bay/Westfield and Sussex) are the key nodes where the major highways enter the Study Area. These major routes are:

- Route 1 (from St. Stephen, N.B. and Calais, Maine which provides a key linkage to the New England states);
- Route 2 (the Trans Canada Highway in the Upper Saint John River Valley and east towards Moncton which links the region to the other Atlantic Provinces and the rest of Canada); and
- Route 7 (a lesser travelled route between Fredericton and Saint John).

Whereas the cities of Fredericton and Saint John are destinations in their own right, Sussex is strategically important as the confluence of Routes 1 and 2.

2). The **core area** of the region is largely unknown to the majority of the travelling public. This generally rural area is defined by the major water bodies - the main Saint John River valley, the Grand Lake system (including Maquapit and French Lakes), Washademoak Lake, Belleisle Bay, Long Reach and the Kennebecasis River Valley. The Kingston Peninsula is a particularly scenic area between two of these water features (Long Reach and the Kennebecasis River).

The core area offers outstanding scenery, a relaxing and unspoiled way of life and suitable resources for outdoor recreation and heritage and crafts appreciation. The key areas of the core are:

- Burton/Maugerville;
- Gagetown/Jemseg;
- Grand Lake;
- Washademoak Lake;
- Queenstown/Evandale;
- Belleisle Bay;
- Long Reach; and
- the Kennebecasis Valley.

3). The **peripheral area** is comprised of service communities which are largely catering to pass-through visitors. These centres include Chipman, Minto, Fredericton Junction and the several suburban communities adjacent to the City of Saint John.

As discussed in the preceding chapter, the four key challenges facing the tourism industry in the Lower Saint John River Valley are:

1. lack of attractions and activities for visitors;
2. lack of accommodations outside urban areas;
3. quality of accommodations and food and beverage facilities and services; and
4. low market awareness.

Chapter 6.0 identifies specific product development opportunities which address the first three of these deficiencies in existing tourism product and services. The low market awareness issue is addressed separately in **Chapter 7.0** which describes the proposed tourism marketing initiatives.

TOURISM DEVELOPMENT OPPORTUNITIES

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6.0 TOURISM DEVELOPMENT OPPORTUNITIES

6.1 Introduction

This chapter details the features of the product development opportunities which have been identified. It also includes the results of an evaluation of each opportunity in terms of its general financial characteristics and regional tourism and economic impacts.

6.2 Product Development Opportunities

Tourism product development opportunities for the region as a whole, and for each of its three component areas, are presented in this section. These development opportunities represent the combined input of ideas and suggestions presented at the public meetings, by the Steering Committee and by the Consultant.

It is important to note that the regional opportunities apply to all parts of the study region. This is supplemented by specific items which are unique to individual communities in either the gateway, core or peripheral areas.

Regional Opportunities

1). **Identify and designate a system of scenic auto touring routes.**

- The specific network of scenic routes (see **Figure 2*** for suggested examples) should include segments of the arterial, collector and local highway networks. They should also place particular emphasis on direct exposure to the river and make maximum utilization of the system of river ferries.

- These routes should be restricted to the "truly" scenic areas of the Valley. Unattractive features and development should be avoided to the extent possible.

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* The figures identified in this chapter are found in the Appendix of this report.

- Proper entry point and scenic route signage should be provided.

- Maximum exposure to scenic views should be provided where appropriate. Underbrush should be cleared to maximize view exposure. At some locations this will include negotiating clearing arrangements with private landowners.

- Designated scenic lookouts should be provided (including parking areas, picnic tables, garbage receptacles and, in some cases, restrooms). These types of facilities (as does the underbrush clearing) have to be done in a manner which minimizes negative environmental impacts.

- Some scenic lookout potential also exists for a few off-road locations such as the top of Scotch Mountain which provides a view of much of the Lower Valley region.

2). **Improve highway conditions on scenic routes.**

- A detailed assessment of the upgrading required on all sections of Route 102 from Gagetown to Westfield should be conducted. This should include specific considerations of pavement surface and shoulder conditions. This item should be integrated into the normal sufficiency assessment and maintenance program assessment carried out by the Department of Transportation.

- Other sections of designated routes noted in **Figure 2** should also be reviewed to ensure conditions are compatible with this scenic function. There are a few cases in which short sections of gravelled surface should be chipsealed (eg. the Perry Point/ North Shore Road between Kingston and Hampton).

- Encourage the Departments of Natural Resources and Energy and Municipal Affairs and Environment to enact legislation to limit clear cutting of woodlots by leaving a buffer strip of 75 metres adjacent to the right-of-way of all highways of scenic quality.

- Establish a spring cleanup program/campaign designed to raise the standard of pride in private property. Include mechanisms such as contests with prizes for the most improved conditions for various categories of development along public highways.

3). **Develop a system of hiking trails (ie. linear park)** consisting of country roads, farm lanes, back country trails and abandoned rail right-of-way sections. The major potential for public hiking trails is along the abandoned rail corridor along the northwest shore of the Saint John River. Some examples of possible trail sections along the rail corridor are shown on **Figure 3**. Key points regarding this item are:

- There are also local short hiking opportunities on private property which will depend on cooperative arrangements between industry operators and property owners.

- Diversions to natural habitat and protected areas should be included in the final designation of hiking trail sections.

- The hiking trail system should be integrated with **sections** of the abandoned rail right-of-way along the river valley (e.g. Oak Point Provincial Park to Public Landing) as well as with abandoned back country trails. This development should proceed in a staged manner to ensure minimum interference with adjacent landowners. Initially, only 1 or 2 of the sections along the abandoned rail right-of-way noted in **Figure 3** should be implemented. A logical first priority for implementation of a test section would be that section between Oak Point Park and Public Landing. This would tie it directly to the existing provincial park and involve a section of corridor with relatively limited development along its length. In addition to the Oak Point Park to Public Landing section, the link sections adjacent to Gagetown also represent good potential. They could also be considered in the early development stages of the test sections of linear park along the abandoned rail right-of-way.

- The need for, and feasibility of, a larger trail/linear park system on the abandoned rail right-of-way should be established on the basis of use achieved on one or two initial, and more isolated, trail sections. These should serve as test sections to establish the success which can be achieved from such a facility. Particular emphasis will be required to control infringements on adjacent private properties and ensure that adequate enforcement can be provided. In the meantime, the province should maintain its option to control the entire length of abandoned rail right-of-way from Westfield to Oromocto. This is necessary to ensure its availability for potential future linear park development should this concept prove to be feasible based on the pilot projects on the test section(s). The topic should be given high priority because of the impact on the adjacent property owners. This is most critical in areas with more extensive development. Upon further examination of this topic, it may be appropriate to totally eliminate some sections from future consideration for trail development (eg. the Neripis to Morrisdale section)*.

- A formal Linear Park Implementation Committee should be established to select, organize, implement and monitor the pilot project for test section(s). It should also provide a management advisory role. This committee should include representatives of governments, industry and adjacent property owners.

- Appropriate and adequate surveillance and enforcement is critical.

4). **Develop a bicycle route network and set of maps/guides.**

- Select appropriate routes with relatively low traffic volumes which at the same time provide appropriate operational and safety characteristics. Routes should provide a range in daily trip lengths (from 50 to 125 km) to accommodate the spectrum of cyclist's endurance. Some examples of potential bicycle touring routes are shown on **Figure 4**.

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* This is important to resolving the issue of control of the abandoned rail right-of-way.

- Link trails with B & B's, country inns and ferry crossings and sites of key natural, historic and craft attractions.

- Install appropriate road signs.

5). **Improve regional boating facilities.**

- Upgrade, expand and maintain recreational boating facilities. This applies to the full spectrum of craft from cartopped and trailerable power and sail boats to large cruising power and sail boats.

- For the medium to larger sized craft, available marina services should be upgraded in accordance with the **"Development Strategy for Recreational Boating in New Brunswick"** prepared in 1986 by Fiander-Good Associates Ltd. for the New Brunswick Department of Tourism, Recreation and Heritage. The product development components identified in that study still provide a sound basis for development of marina and boating facilities in the Lower Saint John River Valley. Some additional minor enhancements to the product development components are noted below.

- Work toward eventual development of a marina facility in the outer Saint John Harbour capable of properly accommodating vessels awaiting slack tide at the Reversing Falls rapids. This facility should be as close as possible to Market Square and the potential Marco Polo development (Item #30).

- Enhance the public accessibility to facilities at the gateway marinas in Saint John (Royal Kennebecasis Yacht Club, Saint John Marina and the Saint John Power Boat Club).

- The key areas for expansion of existing general marina facilities are Fredericton/Oromocto, Gagetown, Douglas Harbour and the Saint John/Grand Bay area (including inner and outer stop-over facilities for vessels traversing the Reversing Falls rapids). Expansion in the short to medium term in these areas should be at existing facilities rather than at new sites. These marina facilities should include consideration of vessel waste pumpout services depending on the results of future appropriate technical evaluations of the need for such services at each of these areas (and the river system as a whole). Further appropriate technical assessment of the actual extent and impact of pollution from boats should be undertaken before any general policy is recommended on this topic. This water quality and pollution assessment should place as much (or more) emphasis on sources of effluent from industrial, commercial and residential sources throughout the river valley (including municipal outfalls and agricultural and livestock grazing activities).

- An area which has good potential, but in which there is still no current marina facility, is the Evandale/Belleisle Bay area. This node is mid-way between the Saint John area and Gagetown facilities. At the same time, it would be conveniently accessible as a home port for the concentration of boat owners residing in the Saint John to Hampton/Sussex corridor. This facility could be a key component of a resort development in the Belleisle Bay/Washademoak Lake area.

- Develop a marine service and repair centre in the central/upper portion of the Study Area. Expansion of repair facilities and services in the lower sections of the Study Area are also required. Such a facility could be integrated with an appropriate lift and winter storage facility for the medium to larger sized craft.

- Repair, refurbish and maintain a strategic network of public riverboat wharfs to provide service for all size classes of recreational boats (see **Figure 5**). Not only do these facilities provide a current and future function, but they also warrant consideration simply due to the fact that they are an important component of the heritage of this river valley.

- Develop a network of boat launch ramps for small trailerable boats (see **Figure 5**). In many cases these facilities can be developed adjacent to the key riverboat wharves which should be maintained.

6). **Develop canoeing facilities.**

- Prime canoeing and naturalist observation areas should be identified (some prime locations are shown on **Figure 6**).

- A network of water access points for small boats and canoes have been identified **(Figure 5)**. This network should be developed and maintained to ensure a reasonable network of facilities available to canoeists and other cartopped or trailerable small craft users.

- This item could include establishing a network of small publicly accessible riverside campsites along the prime canoeing areas. This topic requires further detailed assessment regarding site selection.

- Establish canoe and equipment rental outlets.

7). **Enhance development of the sport fishery in the lakes and river system.**

- This should include expansion of the fish stocking activities and facilities at the provincial fish hatchery in Flowers Cove.

- Development and upgrading of the supporting outfitter industry for this sport/recreation activity is also necessary. This applies throughout the Lower Saint John River Valley Region.

8). **Improve the physical attractiveness of downtown districts** in communities throughout the region (with the exception of Saint John and Fredericton which have/are already carrying out downtown improvement programs). This is required to enhance the overall image of the Lower Saint John River Valley Region.

The desired scale of development would include:

- creating an improved pedestrian experience;
- clearly delineating parking areas from pedestrian areas;
- encouraging commercial outlets with traditional, local products (e.g. crafts and fresh fruit and vegetables);
- designating and identifying heritage buildings; and
- enhancing streetscape and facades of commercial establishments to be more consistent with the heritage of each respective location.

9). **Designate natural habitat and protected areas and provide appropriate viewing opportunities.** Some of the areas of concern and interest to several key market segments for this region are shown on **Figure 7**. These areas are of interest for two reasons: a). to preserve and protect these sensitive waterfowl and wildlife habitat; and b). to provide sources of attraction (if properly controlled) for outdoor/naturalist enthusiasts. Efforts to be undertaken on this topic include:

- Working with natural resource, environmental and wildlife service officials to identify critical habitat areas.

- Encouraging and assisting resource protection, where appropriate.

- Providing visitor facilities (small parking areas, self-guided trails, viewing areas, interpretive facilities, etc.) at strategic points of interest.

10). **Develop the emerging "Bed and Breakfast" component of the accommodations facilities (in larger heritage buildings).**

- This means of expanding the accommodations base is particularly applicable to the smaller communities in the rural sections of the region. It is also applicable to the larger urban areas. Access to these facilities should also be provided via the toll free reservation telephone service at T.I.C.'s.

11). **Upgrade accommodations facilities throughout the region.**

- This is required to enhance the quality of facilities available throughout the region by expanding rooms (in some areas), upgrading rooms, upgrading furnishings and adding additional facilities such as lounges and waiting rooms. Depending on location, expansion of the number of units may be justified. This would require specific feasibility assessment.

12). **Upgrade Foodservices**

- This includes food and beverage services at stand alone restaurant/dining facilities as well as these components of hotel/motel/inns. The quality of the menus, service, furnishings, decor and general appearance are critical. The quality of these facilities and services is as important as their capacity (this item is also stressed in the marketing initiatives noted in **Chapter 7.0, Item 15, Page 7.10**).

GATEWAY COMMUNITIES

Fredericton

13). Initiate a summer theatre program at the Playhouse in Fredericton.

14). Develop a summer crafts program in association with the New Brunswick Crafts School (with potential integration with the elderhostel market).

15). Develop family attractions such as a waterbased amusement area at Hartt Island.

16). Implement the other key development opportunities identified in the "Tourism Related Commercial Opportunities-Fredericton Riverfront" study.

17). Expand the supply of "top of the line" hotel accommodations facilities (including meeting and convention facilities).

Oromocto

18). Develop tourism accommodations close to the riverfront including:

- a new/upgraded hotel; and,
- a new campground.

19). Encourage development of additional riverfront and military base tourism opportunities. The military presence in the region is a significant attraction which should be utilized to its potential. Other complementary opportunities identified in the "Oromocto Riverfront Tourism Development Plan" completed in April, 1988 should be implemented in accordance with the more detailed analysis contained in that study.

Sussex

20). Further develop Poley Mountain to accommodate night skiing (which should enhance the viability of local accommodations and food and beverage establishments).

21). Increase opportunities to exhibit and appreciate the local potash, dairy and poultry industries (e.g. farm tours and mining exhibits and displays). This might be done at least partly, in conjunction with the planned expansion of facilities at Princess Louise Park, the local T.I.C. or on-site at industry plants/facilities.

22). Expand meeting/banquet facilities appropriate to the key demand which exists from Provincial associations and organizations. Sussex's central location between Fredericton, Saint John and Moncton enhances the opportunity for this element of hotel/motel activity. However, there are limitations to the level of demand for these facilities and further detailed feasibility analysis would be required to establish the level of demand and financial viability of such facilities.

23). Upgrade covered bridge sites and signing and expand touring activities out of Sussex. The 16 historic covered bridges in the Hampton to Sussex portion of the Study Area (and an additional 3 in the St. Martins area of Saint John County and 2 in Fundy National Park) are an existing attraction. These resources and other key activities such as the annual Balloon Festival should be properly packaged and integrated into scenic auto and bicycle tours out of the Sussex area. In fact, specific tours (with appropriate information and guide packages) should be prepared as part of the marketing initiatives relating to this opportunity.

Grand Bay/Westfield

24). Develop a public beach in the Henderson Brook area in Grand Bay.

- This will require a feasibility study to evaluate various technical factors and formulate and evaluate concepts for development of such a facility.

25). Develop a pavilion and events program for the Westfield Common.

- Opportunities to associate with, and complement, the "Festival-By-The-Sea" activities should be given high priority.

26). Make the beach at Westfield ferry landing available to the general public (not just the residents of Westfield) and provide a small picnic area.

27). Develop limited tourist facilities (picnic tables, portable toilets and garbage receptacles) for day use of Victoria Beach by touring vacationers and Study Area residents.

28). Expand existing and/or develop new camping facilities in the lower end of Long Reach at Hardings Point, Crystal Beach or Woodmans Point. There is potential for improved dining and land/water interface (docks/moorings) facilities at these locations to enhance access to the waterborne traffic.

29). Develop a replica riverboat (such as the "Purdy" or the "Majestic") to operate in the lower end of the Saint John River system. This vessel should have provisions for fine dining and overnight accommodations. Operation would be on the lower portions of the river. Stopover points could include Oak Point, Public Landing, Westfield/Grand Bay and Saint John (Evandale might be included if vessel operating characteristics would allow safe docking at the public wharf adjacent to the west terminus of the cable ferry). Depending on operating details, service could extend as far up river as Gagetown. Similarly, runs could be scheduled up the Kennebecasis, possibly as far as Hampton.

Saint John

30). Develop a Marco Polo/Historic Village Complex. This development, could include provision for outer harbour (ie. below the falls) cruising craft marina facilities. This project appears to have potential for being **"The"** major tourist attraction in the province, similar to the kind of impact the "Bluenose" has on tourism in Nova Scotia. In fact, the potential impact is probably greater than that of the Bluenose. The potential market awareness to be created by the Marco Polo is regional, national and international in nature (with specific potential as far away as Australia).

31). Develop tour boat services for short term and day/evening trips on the lower reaches of the Saint John and Kennebecasis rivers.

32). Expand on existing Partridge Island tours and current plans regarding enhancement of the three-themed development of Partridge Island.

CORE AREA OPPORTUNITIES

Gagetown

33). Expand on the heritage attractions and facilities in the Gagetown area to enhance its emerging role as one of the central river region's focal points.

- Consider historic/heritage designation for the centre village area.
- Identify and restore heritage buildings.
- Support and expand the collections and activities at the museum.
- Expand the existing nucleus of local crafts.

- Develop a walking tour highlighting heritage buildings and related factors and craft outlets.

34). Develop tours to the Mount House ruins on Gagetown Island (including an interpretive exhibit).

Washademoak Lake/Belleisle Bay Area

35). Develop a resort in the central portion of the Study Area. The Washademoak Lake/Belleisle Bay area is central to the three gateway nodes and, for that matter, to the three major cities of the province. This location enhances the viability of a resort development which could serve the urban and regional population base on a year-round basis and the much larger regional, national and international markets in the peak season. This facility should incorporate a range of elements including tennis and swimming (indoor and out). As well, given the location, a marina should be a key component of such a facility since this is also an area with a definite deficiency in marina facilities.

Peripheral Area Opportunities

Minto/Chipman

36). Establish a historic mining village in the Minto area. An appropriate location on Grand Lake (such as near Flowers Cove) would allow an opportunity to create a historic mining village which could depict a cross-section of activities and characteristics of the 350 years of mining activity including reconstruction of a mining village, shaft mining and strip mining operations, river/lake transportation, etc.

6.3 Evaluation of Tourism Development Opportunities

Table 6.1 has been prepared to assist the reader by consolidating a number of key features associated with each of the 36 tourism development opportunities. This table groups the opportunities on a geographic basis by indicating if it is region wide in scope or an item which applies to one of the three subcomponent areas of the region. For those development opportunities which relate to a specific location within any one of the three subcomponent areas of the region, the specific community is also identified in the location column.

The key components of each development opportunity are presented along with an indication of whether the development is primarily a public or private opportunity. The type of development is also classified as being one of the following:

1). Support Infrastructure;
2). Support Service;
3). Product Business; or
4). Service Business.

The last column of **Table 6.1** summarizes some of the primary points which are critical to highlighting key factors or constraints for each of the development opportunities.

To assist in formulating an implementation strategy and determining relative priorities for the development opportunities, further evaluation of each development was undertaken. This evaluation is summarized in **Table 6.2**. The primary features which were considered in this evaluation and summarized in **Table 6.2** were:

1). Development Opportunity Market Factors;
2). Development Opportunity Financial Factors;
3). Development Opportunity Regional Tourism Impacts; and
4). Development Opportunity Regional Economic Impacts.

Table 6.1

TOURISM DEVELOPMENT OPPORTUNITY DESCRIPTIONS

Tourism Development Opportunities	Location	Components	Type	Operator	Comments
REGIONAL OPPORTUNITIES					
1. Scenic Touring Route Designation	Region-wide (core area focus)	- Designated network of specific touring routes exhibiting high scenic quality with connections to gateway & key core nodes (includes scenic lookouts, viewplanes and entry and route signage).	Support Service	Public	- Potential routes are shown on Figure 2. - Confirm route definition. - Finalize route themes, names and signage. - Road improvements as per Item #2. - Underbrush cutting required to expose potential scenic views. - Create rest stops and picnic facilities at a few strategic sites.
2. Scenic Touring Route Improvements	Region-wide (core area focus)	- Surface and shoulder improvements, minor upgrading, buffer strips, clean-up programs.	Support Infrastructure	Public	- Detailed route specific evaluation required. - Integrate with normal highway maintenance program. - Initiate spring cleanup contests. - Improvements are needed to enhance the positive impacts of scenic routes noted in Item #1. - Major needs are on Route 102 (Gagetown to Westfield).
3. Hiking Trail System (Linear Park)	Region-wide (Along abandoned rail corridor)	- Test sections of abandoned rail corridor. - Trail improvements.	Support Infrastructure	Public	- Requires an Implementation Committee involving government, industry and adjacent land owners. - Provincial Government should maintain option to purchase the right-of-way. - Access control is critical. - Surveillance and enforcement is critical. - Possible test sections are shown on Figure 3.
4. Bicycle Route Network	Region-wide	- Route identification. - Linkages to inns and Bed & Breakfasts. - Linkages to Ferry crossings.	Support Service	Public	- Potential routes are shown on Figure 4. - Touring maps required as support. - Enhance private tour packaging.
5. Improve Boating Facilities	Region-wide (river-oriented)	- Launch ramps. - Public wharves. - Marina development. - Service centres.	Support Infrastructure/ Service Business	Public/ Private	- Development in accordance with the "Development Strategy for Recreational Boating in New Brunswick" with additional enhancements for smaller craft. - Figure 5 illustrates location for some desirable improvements for small craft.

Table 6.1
(Cont'd)

TOURISM DEVELOPMENT OPPORTUNITY DESCRIPTIONS

Tourism Development Opportunities	Location	Components	Type	Operator	Comments
6. Canoeing Facilities	Region-wide (river-oriented)	- Area identification. - Launch areas. - Overnight waterside campsites. - Rental outlets.	Support Infrastructure/ Service Business	Public/ Private	- Convenient access to appropriate waterways. - Figure 6 illustrates the prime canoeing areas.
7. Sport Fishery Development	Region-wide (Core & Periphery focus)	- Lake stocking. - Outfitter services.	Support Service/ Service Business	Public/ Private	- Infrastructure is basically in place. - Expansion of stocking is required. - Outfitters can respond to developing demand.
8. Downtown Improvement Programs	Region-wide	- Pedestrian and parking facilities. - Streetscape & facades. - Outlets for sale of local products.	Support Infrastructure/ Product Business	Public/ Private	- Needs support of other government programs. - Needs community initiative and support.
9. Natural Habitat/ Protected Areas Viewing Facilities	Region-wide (River-oriented)	- Designation of areas. - Limited visitor facilities.	Support Service	Public	- Figure 7 illustrates some known areas of concern. - Environmental specialists should be further consulted to expand the extent of information available.
10. Bed & Breakfast Accommodations	Region-wide	- Individual guest accommodation in large heritage buildings.	Support Infrastructure	Private	- Compliance required with licensing regulations, safety standards and quality assurances.
11. Upgrade Accommodations Facilities	Region-wide	- Motel/Hotel upgrading. - Furnishings upgrading. - Other facilities (meeting rooms, lounges, etc.). - Additional rooms.	Support Infrastructure	Private	- Operators need technical advice and possibly capital assistance. - Specific feasibility studies required.
12. Upgrade Foodservices	Region-wide	- Menu items, local product offerings, quality of product and quality of service.	Support Service	Private	- Operators need technical advice and possibly capital assistance.
GATEWAY COMMUNITIES					
13. Summer Theatre Program	Fredericton	- New programs	Service Business	Private	- Additional operating grants could be required.

Table 6.1
(Cont'd)

TOURISM DEVELOPMENT OPPORTUNITY DESCRIPTIONS

Tourism Development Opportunities	Location	Components	Type	Operator	Comments
14. Summer Crafts Program	Fredericton	- New programs	Service Business	Public	- Potential to tie into elderhostel market.
15. Hartt Island Water-based Amusement Park	Fredericton	- Amphitheatre, bumper boats, Par 3 Golf, wind surfing, jet ski boats, beach, skating, etc.	Service Business	Private	- Flooding implications for permanent facilities. - There may be environmental implications providing access to island.
16. Fredericton Riverfront Developments	Fredericton	—	—	—	- Implement the key development opportunities recommended in the "Tourism Related Commercial Opportunities - Fredericton Riverfront" study.
17. Major Hotel Accommodation	Fredericton	- Bedrooms, Meeting rooms, Convention facilities, foodservices.	Service Business/Support Infrastructure	Private	- May need public support for capital costs.
18. Riverfront Tourist Accommodations	Oromocto	- Hotel accommodations (with meeting facilities). - Campground.	Support Infrastructure	Private	- May need public support for capital costs.
19. Oromocto Riverfront Developments	Oromocto	—	—	—	- Implement the key development opportunities recommended in the "Oromocto Riverfront Tourism Development Plan".
20. Poley Mountain Night Skiing	Sussex	- Lighting.	Support Infrastructure	Private	—
21. Local Industry Exhibits	Sussex	- Exhibits & displays. - Guided tours.	Support Service	Private/ Public	- Requires approval and support of industry and local government. - Facilities could be located at the Sussex T.I.C.
22. Meeting and Banquet Facilities	Sussex	- Meeting and banquet rooms and support services.	Support Infrastructure	Private	- Should be developed in conjunction with an existing hotel/motel.
23. Covered Bridge Sites	Sussex Area	- Upgrade sites for tourist viewing and picnicing. - Improve identification signage.	Support Infrastructure	Public	—

Table 6.1
(Cont'd)

TOURISM DEVELOPMENT OPPORTUNITY DESCRIPTIONS

Tourism Development Opportunities	Location	Components	Type	Operator	Comments
24. Henderson Brook Beach	Grand Bay	- Beach and related recreational facilities.	Support Infrastructure	Public	- Detailed technical feasibility study required (including evaluation of water quality resulting from impact of discharge from sewage lagoon, water depths, beach material and compatibility with adjoining land uses).
25. Westfield Common Pavilion	Westfield	- Parking area. - Site work and landscaping.	Support Infrastructure	Public	- Integrate with "Festival-By-The-Sea".
26. Westfield Beach	Westfield	- Public beach. - Picnic tables. - Site improvements.	Support Infrastructure	Public	—
27. Victoria Beach	Victoria Beach	- Picnic tables. - Portable toilets. - Garbage receptacles. - Access control gates.	Support Infrastructure	Public	- Surveillance and curfew enforcement may be required by staff from the Oak Point Provincial Park.
28. Long Reach Camping Facilities	Lower Long Reach	- Campgrounds. - Restaurant/dining facilities. - Land/water access facilities.	Service Business	Private	- Any developments of this nature in this area should clearly establish the market demand, financial feasibility and impacts on other existing facilities in the vicinity.
29. Riverboat Replica	Lower Saint John River	- Riverboat (with accommodations and fine dining), terminal facilities.	Service Business	Private	- Detailed market and financial feasibility analysis required.
30. Marco Polo/Historic Village	Saint John	- Marco Polo replica. - Historic Village. - Marina.	Service Business/Support Infrastructure	Public/ Private	- Large development with potential for being "the" major tourism attraction in the province. - Detailed technical and financial feasibility study required. - Major government support may be required for capital.
31. Tour Boat(s)	Lower River Region	- Medium sized tour-boat(s).	Service Business	Private	- This item will require arrangements for docking at an existing facility.
32. Partridge Island Tours	Saint John	—	—	—	- Development should follow the course of recommendations and developments subsequent to the recent feasibility study.

Table 6.1
(Cont'd)

TOURISM DEVELOPMENT OPPORTUNITY DESCRIPTIONS

Tourism Development Opportunities	Location	Components	Type	Operator	Comments
CORE AREA OPPORTUNITIES					
33. Heritage Attractions	Gagetown	- Heritage buildings restoration. - Support and expansion of museum facilities and activities. - Expand crafts facilities and activities (eg. retail cooperative). - Historic/heritage village designation.	Support Infrastructure	Public/ Private	- Zoning and heritage by-laws will be required to protect the heritage integrity of areas designated. - The historical society should play the prime role regarding this item.
34. Mount House Tours	Gagetown	- Site restoration and development. - Interpretive exhibits. - Access boat service. - Small boat landing dock.	Support Infrastructure/ Service Business	Public/ Private	- The historical society should play the prime role regarding development of this site and displays. - Operation could possibly be a joint undertaking by the historical society and private interests.
35. Resort Hotel/Marina Complex	Washademoak Lake/ Belleisle Bay Area	- Medium sized resort hotel, marina, pool, tennis courts, meetings/ services facilities, foodservices (dining), limited spa health club facilities, and support services (sleigh rides, cross-country skiing, outdoor ice skating, horseback riding, fishing, canoeing, boat rentals).	Service Business	Private	- This is a major project. Its location in the centre of the three major cities in the province enhance its off-peak viability. - Extensive market and financial analysis is required (including project concept definition, siting, scoping and sizing).
PERIPHERAL AREA OPPORTUNITIES					
36. Historic Coal Mining Village	Minto Area	- Construction of a mining village. - Historic displays of regional mining techniques and transportation methods. - On-site tours of current operations. - Simulated shaft mining operations.	Service Business	Public	- Feasibility assessment required to select site, assess demand, formulate development concepts, evaluate concepts, evaluate costs and determine financial viability.

Table 6.2

EVALUATION OF TOURISM DEVELOPMENT OPPORTUNITIES

	Development Opportunity Market Factors			Development Opportunity Financial Factors			Regional Tourism Impacts			Regional Economic Impacts				
	Extent of Market:									Employment Creation		Expenditures Generated		
Tourism Development Opportunities	Area	Appeal	Uniqueness	Cost Recovery	Capital Costs	Operating & Maintenance Costs	Visitation Generation	Season Extension	Visitor Stay Extension	Direct	Indirect	Direct	Indirect	
REGIONAL OPPORTUNITIES														
1. Scenic Touring Routes Designation	International	Auto and Coach Touring	Atlantic Region/ National	None	Moderate	Low	High	Low to Moderate	Moderate to High	Low	Moderate to High	None	High	1
2. Scenic Touring Routes Improvements	International	Auto and Coach Touring	—	None	High	Low	Low	Low	Moderate	Low	Moderate	None	Moderate	2
3. Hiking Trails System (Linear Park)	National/ International	Outdoor Recreation & Touring Markets	Atlantic Region	None	Moderate	Low	Low to Moderate	High (year-round)	Low to Moderate	Low	Low	None	Moderate	3
4. Bicycle Route Network	National/ International	Touring, Outdoor recreation & specialty markets	Provincial	None	None	Low	Low	Low to Moderate spring & fall)	Moderate	Low	Low	Low	Low	4
5. Improve Boating Facilities	Local and International	Boaters	North America	None to Moderate	High	Moderate	Low to Moderate	Low	Moderate	Low	Low	Low	Low to Moderate	5
6. Canoeing Facilities	Provincial	Outdoor recreation & naturalists markets	Local	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	6
7. Sport Fishery Development	Provincial	Sport Fishermen	Local	Low	Low	Low	Low	High (year-round)	Low	Low	Low	Low	Low	7
8. Downtown Improvement Programs	National/ International	All Markets	—	None to Low	High	Low	Low to Moderate	Low	Moderate	Low	Low to Moderate	Low	Moderate	8
9. Natural Habitat/Protected Areas Viewing Facilities	Local to International	Naturalists Specialty Market	Provincial	None	Low to Moderate	Low	Low	Moderate (Spring & Fall)	Low	None	Low	None	Low to Moderate	9
10. Bed & Breakfast Accommodations	National/ International	Couples	—	Low to Moderate	Moderate to High	Low	Low	Low to Moderate	Low to Moderate	Low to Moderate	Low	Moderate	Low to Moderate	10
11. Upgrade Accommodations Facilities	National/ International	All Markets	—	Moderate to High	Moderate to High	Moderate	Moderate	Low	Low to Moderate	Low	Low to Moderate	Moderate	Moderate	11
12. Upgrade Foodservices	National/ International	All Markets	—	Moderate to High	Low to Moderate	Low	Moderate	Low	Low	Low	Low to Moderate	Moderate	Moderate	12

Table 6.2
(Cont'd)

EVALUATION OF TOURISM DEVELOPMENT OPPORTUNITIES

Tourism Development Opportunities	Development Opportunity Market Factors			Development Opportunity Financial Factors			Regional Tourism Impacts			Regional Economic Impacts				
	Extent of Market:									Employment Creation		Expenditures Generated		
	Area	Appeal	Uniqueness	Cost Recovery	Capital Costs	Operating & Maintenance Costs	Visitation Generation	Season Extension	Visitor Stay Extension	Direct	Indirect	Direct	Indirect	
GATEWAY COMMUNITIES														
13. Summer Theatre Program	National/ International	All Markets	Local	Moderate	None	Moderate	Low	None	Low to Moderate	Low to Moderate	Low	Low	Low to Moderate	13
14. Summer Crafts Program	Local to National	Crafts and Elderhostel Markets	Provincial	Moderate	None	Moderate	Low	None	Low	Low	Low	Low	Low to Moderate	14
15. Hartt Island Waterbased Amusement Park	National/ International	Touring (Family Component)	Local	High	High	High	Low to Moderate	Low	Moderate	Low to Moderate	Low	Moderate	Moderate	15
16. Fredericton Riverfront Developments	—	—	—	—	—	—	—	—	—	—	—	—	—	16
17. Fredericton Major Hotel Accommodation	National/ International	All Markets	Local	High	High	High	Moderate to High	High	Moderate	High	Moderate	High	High	17
18. Oromocto Riverfront Tourism Accommodations	National/ International	All Markets	Local	High	High	High	Moderate	Moderate	Low to Moderate	Moderate to High	Moderate	Moderate	Moderate	18
19. Oromocto Riverfront Developments	—	—	—	—	—	—	—	—	—	—	—	—	—	19
20. Poley Mountain Night Skiing	Atlantic Region	Skiers	Local	Moderate	Moderate	Moderate	Moderate	None	High	Moderate	Low to Moderate	Moderate	Moderate	20
21. Local Industry Exhibitions	National/ International	Touring Markets	Local	None	Low	Low	Low	None	Low	Low	None	Low	Low	21
22. Meeting and Banquet Facilities	Provincial	Local Organizations & Associations	—	Moderate	Moderate to High	Moderate to High	Moderate	Low	Low	Low to Moderate	Low	Moderate	Moderate	22
23. Covered Bridge Sites	National	All Markets	National/ International	None	Moderate	Low	Low to Moderate	None	Low	None	None	None	Low	23
24. Henderson Brook Beach	Local	Recreation	—	None	Moderate	Low	Low	None	Low	Low	None	None	None	24
25. Westfield Common Pavilion	Local	Family Market	Local	None	Moderate	Low	Low	None	Low	Low	None	None	Low	25
26. Westfield Beach	Local	Family and Touring Market	—	None	Low	Low	Low	None	Low	Low	None	None	Low	26

Table 6.2
(Cont'd)

EVALUATION OF TOURISM DEVELOPMENT OPPORTUNITIES

	Development Opportunity Market Factors			Development Opportunity Financial Factors			Regional Tourism Impacts			Regional Economic Impacts				
	Extent of Market:									Employment Creation		Expenditures Generated		
Tourism Development Opportunities	Area	Appeal	Uniqueness	Cost Recovery	Capital Costs	Operating & Maintenance Costs	Visitation Generation	Season Extension	Visitor Stay Extension	Direct	Indirect	Direct	Indirect	
27. Victoria Beach	Local	Family and Touring Market	—	None	Low	Low	Low	None	Low	None	None	None	Low	27
28. Long Beach Camping Facilities	National/ International	Touring and Boating Markets	—	Moderate	High	Moderate	Low to Moderate	Low	Low to Moderate	Low	Low	Low to Moderate	Low	28
29. Riverboat Replica	National/ International	All Markets	Regional to National	High	High	High	Low to Moderate	Moderate (spring & fall)	Moderate to High	Low to Moderate	Low	Moderate to High	Moderate	29
30. Marco Polo/Historic Village	International	All Markets	International	High	Very High	High	High	Moderate to High (spring & fall)	Moderate to High	High	High	High	High	30
31. Tour Boat(s)	National/ International	All Markets	Local	Moderate	Moderate to High	Moderate	Low to Moderate	Low	Low to Moderate	Low	Low	Low to Moderate	Low to Moderate	31
32. Partridge Island Tours	—	—	—	—	—	—	—	—	—	—	—	—	—	32
CORE AREA OPPORTUNITIES														
33. Heritage Attractions	National/ International	Heritage Market	Provincial	Low	Moderate to High	Low	Moderate	Moderate	Moderate	Low to Moderate	Low to Moderate	Low	Moderate	33
34. Haunt House Tours	National/ International	Heritage Market	Provincial	Low	Low	Low	Low	Low	Low to Moderate	Low	Low	Low	Low to Moderate	34
35. Resort Hotel/Marina Complex	Regional to International (including Europe)	Upscale Market	Atlantic Region	High	High	High	Moderate to High	High	Moderate to High	Moderate to High	Moderate	High	Low to Moderate	35
PERIPHERAL AREA OPPORTUNITIES														
36. Historic Coal Mining Village	Provincial to Atlantic Region	Touring Market	New Brunswick	Low	High	Moderate	Moderate	Low to Moderate	Low to Moderate	Low to Moderate	Low	Low	Low to Moderate	36

The development opportunity market factors evaluation indicates the marketability of each development with respect to:

1). the geographical area from which the majority of visitors would be drawn;
2). the appeal in terms of the key market segments from which the specific development would derive its visitors;
3). the uniqueness of the development in terms of the area within which it could be considered unique. Outside of this area, there would be similar and competing developments.

The financial factors associated with each development opportunity were summarized as those relating to:

1). the relative ability of the development to recover costs which would have to be incurred in order to implement the development;
2). the relative magnitude of the capital costs of the development; and
3). the relative magnitude of the operating and maintenance costs.

The cost recovery capabilities of the development opportunities have been rated as high, moderate, low and none. Obviously, cost recovery is not relevant to some of the items, such as the designation of scenic touring routes. This is simply a function which would be undertaken by efforts of the Lower Saint John River Valley Promotion Association and the appropriate Departments of the Provincial Government. Consequently, it is not an item for which cost recovery is a factor. However, for some of the other specific items, particularly those which are private sector items, cost recovery is a critical factor.

Capital costs have been categorized into low, moderate and high categories with the following general magnitude of costs associated with each:

1).	Low:	Capital costs less than $50,000;
2).	Moderate:	Capital costs of $50,000 to $250,000; and
3).	High:	Capital costs in excess of $250,000.

Similarly, operating and maintenance costs were identified in either low, moderate or high categories.

The regional tourism benefits summarize the ability of each development opportunity to address the following three important factors regarding tourism benefits to the region:

1). visitation generation;
2). season extension; and
3). visitor stay extension.

Visitation generation is an indication of the relative ability of the development to generate additional visitation to the Study Area. Season extension relates to the relative ability to extend visitation activity beyond the summer peak, either in the spring or fall shoulder periods or in the winter off-peak period. Visitation stay extension was evaluated on the basis of the development's relative ability to enhance the prospects of visitors staying for a longer period of time.

The regional economic factors considered were the ability of the development opportunity to enhance employment creation as well as expenditures in the region. These factors were considered on the basis of the direct regional employment and expenditures generated by the specific development opportunity. As well, the ability of each development to result in indirect jobs or indirect expenditures in the region was also evaluated. It will be evident from examining **Table 6.2** that in many cases a tourism opportunity may not rate highly in terms of the direct employment or expenditures generated by the development itself but, in fact, may provide a greater impact in terms of indirect expenditures on other goods and services and employment in the region. Typically, this happens for development which extend the length of stay of visitors in the region. In such cases, although the development may not result directly in major expenditures by tourists, it will stimulate expenditures on other goods and services due to their extended stay in the region.

The information in **Table 6.2** provided a prime source of input in the overall evaluation of product development opportunities which eventually led to selection of priority categories for these opportunities. This analysis is discussed further in **Chapter 8.0**.

TOURISM MARKETING INITIATIVES

7.0 TOURISM MARKETING INITIATIVES

7.1 Introduction

This chapter presents the marketing initiatives which were derived from evaluating the region's existing tourism industry. These marketing initiatives are presented in the same geographic format as was used for the product development opportunities (ie. on the basis of regional, gateway communities, core area and peripheral area items).

The most significant marketing issue facing the Lower Saint John River Valley region is the low level of market awareness of the area outside of New Brunswick. Within the Atlantic provinces, recognition of the area is somewhat higher due to the traditional levels of cottaging and boating which take place in the region. The lack of market awareness is probably indicative of the early stage of the region's tourism development. Efforts are not needed to undo a negative marketing image; rather, the marketing strategy can build a positive image within the priority market segments. The key market segments can be attracted to what they will view as a newly discovered, unspoiled region.

The second most significant issue relates to the fact that the Lower River Valley has a distinct identity apart from that of the Upper River Valley. The lower valley should create and promote its own image and operate as a distinct tourism region.

The overall goal for market-related activity is as follows:

> **To increase market awareness based on creating and reinforcing a cohesive image for the Lower Saint John River Valley Region."**

Three objectives have been developed to enhance this overall goal:

1). enhance consumer awareness among significant target markets;
2). enhance visitor awareness of available activities and attractions through improved packaging and marketing; and
3). increase visitation from the priority market segments.

Effective marketing can be established for the Lower Saint John River Valley Region through consideration of the following factors:

- **Focussed promotional efforts.** By selecting and agreeing upon priority markets, budgets can be used most efficiently. It is critical to avoid trying to target too wide a range of market segments and risk not marketing effectively to any of them.
- **Coordination between associations and agencies.** Marketing for the Region is presently receiving limited effort by three types of groups (the province, municipalities and the Lower Saint John River Promotion Association). In fact, marketing is the major focus of the Lower Saint John River Valley Promotion Association. In order to reinforce a single clear image, coordination of marketing efforts by all three types of groups should be arranged.
- **Improved packaging.** To overcome the low level of market awareness, packages which provide a complete range of accommodations and activities can greatly increase the region's attractiveness.
- **Better market information.** Market information includes a range of elements from literature through highway signage and information books. Successful information delivery involves a systematic approach which is helpful, thorough, well-coordinated and strategically placed and/or available to customers.
- **Higher Levels of Market Research.** Once improved marketing efforts are underway, it will be of critical importance to measure progress against objective milestones. The messages which the Region delivers to the public have to be developed and tested based on feedback from the marketplace. Effective market research will shorten the learning time regarding market perceptions.

7.2 Marketing Initiatives

The following describes the key marketing initiatives which are recommended to accomplish the stated goal and objectives.

REGIONAL INITIATIVES

1). **Coordinate marketing efforts through a full-time Marketing Manager.**

A full-time qualified individual is required to ensure appropriate attention is given the implementation of the marketing initiatives identified in this document. This position is critical because the level of effort required simply cannot be provided by volunteer, part-time input.

The Lower Saint John River Valley Promotion Association should prepare a marketing plan which recognizes and, to the degree possible, coordinates the marketing efforts of the major organizations in the region (Visitor and Communications Bureaus, Hospitality NB and the New Brunswick Department of Tourism, Recreation and Heritage). In order to accomplish this task, the Association should pursue provincial funding with a contribution from its membership to hire a full-time marketing manager.

The Association's Marketing Manager should also assist member municipalities, agencies and businesses in coordinating the annual schedule of activities, special events, fairs, exhibitions, etc. so it maximizes the possibilities for attending a series of events as one proceeds up or down the river valley. This will tend to help capture (or retain) visitors in the area for a longer period of time. Other responsibilities of the Marketing Manager are listed in Section 7.3, Page 7.?.

2). **Develop a single, focused theme for the Lower Saint John River Valley Region.**

As a region, the Lower Saint John River Valley is held together by the river and lake system and is reinforced by some dramatic scenery. The region exhibits a number of small communities, a rich agricultural landscape, valuable waterfowl and wildlife natural habitat and protected areas, and a wealth of heritage features. The region offers visitors a pleasant, slow moving pace to unwind and appreciate their stay. These themes, unified by a great river system, characterize the impression most people have about the Lower Saint John River Valley. This image should be enhanced with appropriate marketing efforts and be communicated to the priority market segments.

The distinct characteristics of the lower valley should be acknowledged and portrayed through a unified system of signage with a specific symbol (such as the regional signage system used in Nova Scotia).

A number of songs received in a competition held by the Association capture the essence of the Lower Saint John River Valley Region. These should be used as promotional materials at home and in the priority market areas.

Care should also be taken to prepare the promotional material on this region so that it places this region is a general provincial perspective (ie. portray it properly dovetailed into an overall provincial perspective).

3). **Focus marketing efforts on priority markets.**

Rather than disperse efforts among a wide range of potential markets, available marketing funds and activity should be directed towards the following priority market segments:

1).	Touring market (Group and individual)	Ontario; New England; and Mid-Atlantic States.

2). Outdoor recreation market: - Bicycling; - Canoeing; - Hiking; and - Boating (all types).	Central Canada; New England; and Atlantic Provinces.
3). Heritage, culture and education market (specialty interests)	Central Canada; Atlantic provinces; New England; Mid-Atlantic States; and Other International visitors.

4). **Establish a coordinated marketing information system.**

The marketing information system should consist of the marketing items and services information which a consumer needs to make an informed decision to undertake a trip and to enjoy the destination more fully after they arrive. The proposed components of the marketing information system are:

- Lure brochures;
- Visitor guides;
- Information centres and/or toll free phone lines;
- Guide maps; and
- Signage.

The present Association map serves as both a brochure and guide. Separate and attractive lure brochures (single sheets) have been developed but are not coordinated with the map. The high graphic standard achieved in these materials can be used consistently with greater effect.

5). **Improve tourism oriented signage on Provincial roads and for individual communities.**

Signs should clearly indicate:

- key regional entry points at the gateway communities;
- scenic points/routes; and
- community centres/nodes and services available.

Signs should be:

- of high graphic quality;
- consistent in format with highly legible detail;
- based on use of internationally recognized symbols; and
- noncommercial to the extent possible.

Further efforts are required to prepare a specific signage policy. This should include detailed evaluation of other options such as the approach used in some of the New England states.

Select an appropriate designation for the "River Road" (Highway 102 between Gagetown and Westfield). The LSJRVPA should conduct a contest to select the most appropriate name for this scenic route. Possible examples are: "Old Malecite Trail, Loyalist Trail, True Blue Trail, Osprey Trail". Perhaps the most easily adaptable is "Osprey Trail" since the osprey is one of three items already being used in the Association's logo and on several of the publications prepared by the LSJRVPA.

6). **Develop specialized travel packages for the priority market segments.**

Proposed specialized travel packages and new products which can be marketed to the public include, but are not limited to, the following:

- canoe packages from "inn to inn" or "B & B" to "B & B" (see **Figure 6**);

- bicycle tours (out and back from either the gateway to the core and peripheral nodes, or from inn to inn, see **Figure 4**);

- day excursions by bus or car (see **Figure 2**) such as a "River Roads Package" from Saint John, Fredericton or Sussex. For example, this could include a run from Saint John to Westfield, crossing on the ferry to Hardings Point, up the Kingston Peninsula side of Long Reach, around Kingston Creek, along Belleisle Bay, across the Belleisle Bay ferry back to the Evandale (via another ferry) and down the north side of Long Reach by Oak Point Provincial Park back to Saint John. Similar runs could include Gagetown, Jemseg, Lower Jemseg and Cambridge-Narrows. From Fredericton, a package to Jemseg (along Route 2), crossing to Gagetown for lunch and a community tour is one short excursion. This could be completed by a stop at craft shops and/or fruit and vegetable stands on the way back to Fredericton. A longer version of this trip could extend the itinerary to Hampstead, Evandale, across the ferry and up the opposite side of the river through the striking scenery in the Wickham area to Cambridge-Narrows and back to Jemseg via the equally scenic Colwell's Creek area.

- A "Grand House" tour package could originate in Westfield and run on to the Saint John and Rothesay areas.

- Preparation of a "Bed & Breakfast" and "Country Inn" guidebook which is of interest to specialty market segments as well as the auto touring group.

All of these packages should provide key information on the attractions and facilities along routes. Trip distance, road type and condition and appropriate travel times should be included.

These efforts should also include liaison with operators of a number of attractions (services which tend to operate only during the peak season to extend their season of operations (especially for groups and bus tours).

7). **Encourage promotion and sale of regional products and crafts in commercial establishments throughout the region.**

This applies to accommodations, gift shops and food service. The crafts industry is extremely critical to tourism in this region. It has not yet matured but it has tremendous potential. It should be supported both in terms of promotional and development aspects.

8). **Implement the marketing elements of the 1986 "Development Strategy for Recreational Boating in New Brunswick".**

Some key elements of that strategy have not been actively pursued. All elements of the boating marketing strategy should be pursued with greater intensity if this non-resident market (from the northeast United States) is to be developed to its potential. The main element of the 1986 Recreational Boating Strategy is preparation of a proper **Cruising Guide** for the Lower Saint John River Valley (and the Bay of Fundy coast from Saint John to the Maine border). This guide should be of the caliber of the two cruising guides published for the Maine coast during the past year.

9). **Establish a system for recognizing and identifying historic buildings and heritage features.**

- Designate and identify buildings and facilities (eg. cemeteries, fort sites, native settlements, etc.) of local, provincial and national significance;

- Produce a regional guidebook and/or illustrative field manual of these topics; and

- Establish a Lower Saint John River Heritage Registry. This can be done in conjunction with, and in support of efforts, by groups such as the Queens County Historical Society. Many of these items of interest are listed in **Table 2.5** of the **Phase I Background Document**.

10). **Organize heritage home and garden tours by appointment or on a scheduled basis (this applies in both the rural and urban areas).**

These activities can be most easily accommodated in urban areas. However, there are many beautiful structures and heritage items of interest in the rural areas. Efforts in arranging tours such as those which have been undertaken by the Queens County Historical society should be expanded.

11). **Establish an Ancestral Registry.**

- Solicit cooperation and expertise from area museums and historical societies.
- Inventory the origins of graveyards, street names and physical features to assist visitors in establishing personal and family connections.
- Develop displays showing early migrations and settlements (e.g. The Historical Atlas of Canada maps) at area facilities to reinforce connection to early American history which is of interest to the large American market segment.

12). **Promote existing natural habitat and protected areas.**

This could include:

- developing visitor programs and providing information packages regarding existing protected areas;
- providing visitor and convention services offices in each community with a list of potential sites and activities of interest to naturalists.

- contacting area naturalist clubs to encourage hosting of special events (e.g. invite and host chapters of groups such as the Audobon Society for observation tours during the spring and fall migration periods).

- designing a uniform system of signs to be placed at strategic points around the protected areas. A design might be based on the graphic symbols used in the map (eg. an osprey against rolling hills of the valley's edge).

- developing pamphlets and brochures describing the area's resource significance.

- printing information in tourist guides and distributing brochures from area T.I.C.'s.

13). **Develop a winter brochure of activities, attractions and accommodations.**

This is a specialty item which is required to enhance the lack of off-season activity prevalent throughout the region.

14). **Establish a Marketing Performance Monitoring and Evaluation System.**

The objective of this system is to acquire market research information to evaluate the success of the new product developments and the marketing and promotional initiatives in terms of increasing activity of the industry in the Lower Saint John River Valley Region. This would entail ensuring that data sources pertain specifically to the region as defined in this study.

This initiative would be coordinated by the LSJRVPA. It would include:

- an inquiry and sales call monitoring system;

- review and evaluation of comparable **regional data** available to the province from federal tourism surveys;

- participation in, and lobbying for, continuation of the New Brunswick Auto Exit Surveys and Motorcoach Operator Survey (along with followup evaluation); and

- participation and evaluation in Omnibus Surveys to track awareness of the Lower Saint John River Valley Region.

15). Develop a Tourism Training Programs.

Training programs are typically targeted at the following two different client groups:

- o the owner/operator group; and
- o the frontline staff group.

In this case, it is recommended that owner/operator training encompass that of the frontline staff. The reason for this overlap is to ensure that owner/operators are able to properly train new employees and enforce a level of quality assurance throughout their operation.

The objectives of the industry training system are as follows:

- o To identify employer and employee training needs and to be responsive to these identified needs;

- o To improve the quality of service available to tourists;

- o To provide consistent levels of quality assurance throughout the industry;

- To increase profitability of existing tourism operations; and
- To increase the number and quality of tourism careers available throughout the Study Area.

In response to the previously identified objectives, the following training programs are recommended:

- Employee/Employer Needs Assessment;
- Establishment of a Training Resource Centre;
- Subscription to American Hotel/Motel Association (AHMA) Training Programs;
- Subscription to Tourism Canada's "Tourism is Your Business" Series; and
- Expansion of existing and development of new Customized Training Programs.

16). **Develop an Effective Public and Industry Awareness Program.**

The most effective way to promote friendly, positive attitudes on the part of the general public is to increase awareness of the widespread benefits of the tourism industry and to foster the perception that everyone is part of the tourism industry and everyone has a part in its success.

In response to the above-defined objectives, the following three awareness programs are proposed:

a). **Valley Appreciation Week** which would include:

- Residents and tourism industry personnel should be invited to visit the Valley's tourist attractions and facilities free of charge (or at reduced rates) during some week just prior to the main tourist season. Emphasis should be placed on increasing resident familiarity with attractions and facilities within their immediate vicinity.

- Incentives should be used to encourage residents to participate in this program. Incentives might include, for example, free transportation, buttons and balloons, free coffee and soft drinks, entertainment, barbecues or any other activities that help to promote participation, create a festive atmosphere and demonstrate the quality of the Valley's attractions.

- Valley Appreciation Week should be heavily promoted through the use of public service advertisements on television and radio and in the printed media.

- Local organizations, including the LSJRVPA and others such as the Bed and Breakfast Operators Association should be used to the extent possible for organizational purposes.

b). **Tourism Awareness Program** including:

- The LSJRVPA should initiate a communications program aimed at increasing public awareness of the economic significance of the tourism industry. This program should also increase awareness of tourism-related opportunities and provide advice on means of deriving greater benefits from the tourism industry.

- Program delivery should take the form of seminars and talks to various local groups as well as articles in popular/widely distributed newspapers, magazines and newsletters and special features on local radio and television stations.

c). **Encourage adoption and participation in a Provincial Quality Assurance Program** including:

- The LSJRVPA should promote participation by Valley tourist establishments (fixed-roof accommodation establishments, campgrounds, restaurants, craft shops, service stations, etc.) in a code of ethics and programs aimed at achieving a high quality of service by the industry operators. Incentives should include the prominent display of a specific logo indicating membership in the Association. This logo could also be used in listings of participating operations in any publicly sponsored promotional material.

- Participants should receive an Association sign and membership certificate (or sticker) for display on their properties. The LSJRVPA could also act as a liaison for assistance with menu development; comment cards for use by customers and a variety of other items which impact on customer service and the image of the industry.

GATEWAY COMMUNITY INITIATIVES

17). **Use the T.I.C.'s at all three gateway nodes as focal points for distributing promotional material and information packages.**

This should apply to all of the Lower Saint John River Valley Region marketing items. This should also include preparation of specific audio-visual slide presentations on the Valley Region to be used in the three gateway T.I.C.'s.

Fredericton/Saint John

18). **Relocate the westbound T.I.C. in Fredericton.** This facility should be moved to a location east of the Princess Margaret Bridge so it captures the tourists before they pass by the city.

19). **Enhance existing heritage walking tours.**

This should include:

- developing rental audio tapes and making portable tape players available to provide visitors with a self-contained, guided tour.

Sussex

20). **Sussex should be emphasized in the New Brunswick Travel Guide as a gateway node to this region.**

This node is a key entry point for the region. It is important as a centre of agricultural activity and opportunities for local/regional meetings and banquets are a key market potential.

21). **Promote Sussex as a base for winter activities.**

Winter activities should emphasize downhill and cross-country skiing, snow-mobiling, skating and facilities for hockey tournaments.

22). **In addition to promoting the Lower Saint John River Valley Region, the Fundy Tidal Coast Region should also be promoted as a key scenic area easily accessible from a Sussex base.**

Although this study concentrates on the Lower Saint John River Valley Region, Sussex has a natural, long standing affinity to the Bay of Fundy coastal zone which should also be highlighted in all promotional material for this part of the Study Area.

CORE AREA INITIATIVES

Gagetown

23). **Continue marketing to specialized groups** (i.e. Royal Society of Architects, Covered Bridge Society of New England, and the United Empire Loyalists Association).

- This would supplement the regional marketing initiatives which apply to Gagetown and all other areas of the region.
- Prepare information packages on other features including items such as farmers markets and U-Pick strawberry locations.

Minto/Chipman

24). **Promote revitalized sport fishing opportunities.**

This should include:

- Preparing information packages describing the 100 lakes being stocked with trout for ice fishing.
- Promoting the Brook trout and major lake fishing which is being developed.
- Preparing education packages on the "Splake" which have been developed and are being stocked in Grand Lake. This work should assist development of this resource which is expected to do well within a 3 to 5 year period.
- Enhancing promotion efforts of the fish hatchery and stocking activities at the Provincial Hatchery in Flowers Cove. The efforts of the work being done at this facility appear to be critical to development of a lucrative sport fishing component of the tourism industry in the Study Area.

- It is also important to note that although the current activity in developing the fish stocks is taking place in the Minto area, the impact of future development of the sport fishery is broad ranging and covers most of the Study Area.

7.3 Management of Marketing Activities

In order to accomplish the above recommendations, it is critical that full-time staff be available to the Association. It is recommended (#1 above) that a full-time Marketing Manager be hired to coordinate and direct Association activities. Funding for the position should be a joint undertaking between the Province and the Lower Saint John River Valley Promotion Association. Initially, the major share of funding would likely have to come from the Province.

The primary responsibilities of the Marketing Manager will include:

- Planning and carrying out annual marketing activities on behalf of the Association and its members;
- Coordinating the marketing efforts of the other three major tourism organizations with respect to the Lower Saint John River Valley region (i.e. FCVB, SJVCB and N.B. Tourism);
- Encouraging and assisting industry operators in carrying out additional marketing efforts and to develop special information and promotion packages for the priority market segments; and
- Evaluating the market performance of the Region according to predetermined criteria. The marketing manager should also lobby for direct special research assignments to further identify and profile market performance. Additional support for the Association's Marketing Manager should include an office, secretarial support and an adequate promotional budget.

IMPLEMENTATION PLAN

FGA

8.0

8.0 IMPLEMENTATION PLAN

8.1 Introduction

This chapter sets out the final priority rankings for each development opportunity and marketing initiative. It also develops an initial schedule of planning, approvals and implementation activities. The priorities determined for implementation of the recommendations were derived from the evaluation of the development opportunities in **Chapter 6.0** and the strategic marketing initiatives presented in **Chapter 7.0**. Priorities are assigned on the basis of ranked groups (four levels for the development opportunities and three levels for marketing initiatives). Within each priority group, no distinctions are drawn as to relative priority of individual items. Specific opportunities or initiatives may already be underway while others may require a longer time period for their development. Periods indicated for planning and approvals, construction and on-going operations are approximate and are based on the level of effort required to develop comparable facilities or programs in other jurisdictions.

It is important to recognize that both product development opportunities and marketing initiatives have been evaluated in terms of their overall regional impacts. The product development opportunities were also evaluated specifically in terms of the three key sets of objectives (ie. cultural/social, environmental and economic) which form the basis for the strategy. In this way, the final evaluation of priorities relates back to the initial set of objectives underlying the overall strategy.

It is also evident from reviewing the final priorities defined in the following sections that the items with greatest priority are those opportunities and initiatives which have the greatest impact and are most fundamental to tourism development in the region. The lower priority categories have correspondingly less impact. This does not imply that the development opportunities or marketing initiatives assigned to a lower priority group are not viable, just that they have less regional impact and urgency to be implemented.

8.2 Implementation Committee

It is essential that a mechanism be established to enhance implementation of the strategy identified in this document. If this follow-up is not provided, the efforts of many who have worked toward organizing and conducting this study may be lost. Therefore, it is recommended that an Implementation Committee be established to deal with the follow through necessary to put the recommendations of this study in place. This committee should be the coordinating group for implementation. It should include representation from the Lower Saint John River Valley Promotion Association, the Department of Tourism, Recreation and Heritage and municipalities throughout the Study Area. In addition, input may be requested at times from other departments as appropriate (eg. Municipal Affairs and Environment, Natural Resources and Energy and Transportation) depending on specific issues under consideration.

The Implementation Committee should, if possible, include several of the people who participated on the Steering Committee for this study. This is critical to maintain continuity and proper appreciation of the many subtle items of great importance to the focus and thrust of this strategy. This committee should also act as an advisory group to the LSJRVPA and its proposed full-time marketing manager.

The Implementation Committee should also give on-going periodic attention to all types of development (not just tourism related) within the Study Area. This is important for both the urban and the rural areas if the true character of the region is to be protected and preserved. The region has already seen substantial pressure from urban sprawl and ribbon development. Frankly, some of this development is detrimental to the character of the region. The Committee should monitor all types of development in the region and act as a focus group to guide overall development so that it preserves the character of the region and enables the tourism industry to develop in accordance with this strategy.

Current legislation provides for Municipal Plans for all incorporated areas. These plans are reviewed periodically. Whenever plans are reviewed, the Committee should take the initiative to ensure that future proposed land uses and associated regulations accommodate and preserve the opportunity to focus tourism development in the direction inherent in this strategy.

Furthermore, the Committee should pursue the option of having Basic Planning Statements prepared and adopted for the unincorporated sections of the Study Area. Given existing legislation, this is probably the most effective way of controlling land use development in rural areas. Both Municipal Plans and Basic Planning Statements should be used to their fullest as mechanisms to assist in controlling development which is compatible with and supportive of this tourism strategy.

In the medium to longer term, depending on how development occurs and the extent to which it may be deemed detrimental to the character of the valley and the focus of this strategy, it may be appropriate to consider additional legislative changes or formation of a River Authority.

8.3 Priority Groupings for Development Opportunities and Marketing Initiatives

Priority rankings of the various **development opportunities** were developed through a summary analysis of the overall economic benefits, the potential cultural and social benefits or impacts, and the environmental impacts. Factors for each of these topics were defined according to the goals and objectives set out for the region in **Chapter 5.0** and the priority categories listed below. The final priority rankings which resulted from the analysis of development opportunities are presented in **Table 8.1**. For convenience, the reference number from **Chapter 6.0** has been noted at the end of each development opportunity description.

The items in the priority groupings are categorized on the basis of:

Table 8.1

PRIORITY GROUPINGS FOR TOURISM DEVELOPMENT OPPORTUNITIES*

Priority Group	Description of Opportunity
I	Scenic Touring Route Designation (#1)**
	Scenic Touring Route Improvements (#2)
	Improve Boating Facilities (#5)
	Bed & Breakfast Accommodations (#10)
	Upgrading Accommodations Facilities (#11)
	Upgrading Foodservices (#12)
	Major Hotel Accommodations (Fredericton) (#17)
II	Sport Fishery Development (#7)
	Downtown Improvement Programs (#8)
	Natural Habitat/Protected Areas Viewing Facilities (#9)
	Hartt Island Waterbased Amusement Park (#15)
	Oromocto Riverfront Accommodations (#18)
	Riverboat Replica (#29)
	Marco Polo/Historic Village (#30)
	Tour Boat(s) (#31)
	Heritage Attractions - Gagetown (#33)
	Resort Hotel/Marina Complex (#35)
III	Hiking Trail System - Linear Park (#3)
	Summer Theatre Program (#13)
	Summer Crafts Program (#14)
	Poley Mountain - Night Skiing (#20)
	Meeting and Banquet Facilities - Sussex (#22)
	Covered Bridges Sites (#23)
	Long Reach Camping Facilities (#28)
	Historic Coal Mining Village (#36)
IV	Bicycle Route Network (#4)
	Canoeing Facilities (#6)
	Local Industry Exhibitions - Sussex (#21)
	Henderson Brook Beach (#24)
	Westfield Common Pavilion (#25)
	Westfield Beach (#26)
	Victoria Beach (#27)
	Mount House Tours (#34)

* These groupings do not include the items relating to waterfront improvements in Fredericton and Oromocto or the Partridge Island opportunities. These items were the topic of separate, detailed feasibility studies. Implementation of the components of these items should be done in accordance with the implementation plan for each of the respective studies. To a large extent, the same applies for the major marina development items as that topic has also been covered by a separate, detailed study. However, this current study has also considered several recreational boating enhancements, in particular, specific items not addressed in the earlier study (eg. small trailerable craft, canoes, etc.). Therefore, this item is included in this chapter.

** The numbers after each opportunity are the numbers assigned to this opportunity in Chapter 6.0.

1). the **key items of infrastructure and service** that are **necessary** to provide the **primary product base** to make this region a desirable destination area **(Priority Group I)**;

2). setting up **specific operations and services which expand on the attractiveness of the region** in a manner consistent with the desired focus of development **(Priority Group II)**;

3). **supplementary infrastructure and services which enhance** the overall desirability and attractiveness of the **region (Priority Group III)**; and

4). **other complementary items** which support the general thrust of the policy but individually have a lower direct impact and less urgency **(Priority Group IV)**.

Marketing initiatives are categorized by three priority groupings (the initiative reference number assigned in **Chapter 7.0** has been retained here).

For the marketing initiatives, the three priority groupings have been established by selecting the priorities based on:

1). **Highest priority** going to those items which relate to **key regional marketing initiatives**. The important qualifying feature is that these items all relate to organizing, coordinating and implementing initiatives which are **regional in nature**;

2). The **moderate priority initiatives** being those which should be pursued subsequent to the higher priority development opportunities and which have a **more moderate influence on regional tourism and economic impacts**; and

3). **Final priority items** being those which are specific promotional initiatives having **positive impacts but relating only to limited geographic areas** and have **less regional impact** than other items which apply on a broader basis throughout the region. This category also includes implementation of a marketing monitoring system which would not be necessary until the marketing plan has been implemented and taken effect.

Table 8.2 summarizes the allocation of priorities for the marketing initiatives.

8.4 Proposed Implementation Schedule

Tables 8.3 to 8.6 set out recommendations for the phased implementation of development opportunities and marketing initiatives. In general, the highest priority recommendations are scheduled for implementation at the earliest possible time, although allowances for proper sequencing, planning and approvals, and approximate construction schedules are included. Nonetheless, there are numerous recommendations which could go ahead immediately, regardless of their priority ranking. For example, the marketing components of the recreational boating strategy* have been previously identified and can proceed immediately. In particular, a key item of the complementary 1986 boating study, the cruising guide to assist attraction of the prime segment of this market, should proceed as soon as possible.

Several opportunities, such as the downtown improvements will depend on agencies other than New Brunswick Department of Tourism, Recreation and Heritage and the Lower Saint John River Valley Promotion Association, and could also go ahead in the near future. Some communities will be involved in design, construction and completion of their improvements at different times.

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* Development Strategy for Recreational Boating in New Brunswick, 1986.

Table 8.2

PRIORITY GROUPINGS FOR MARKETING INITIATIVES

Priority Group	Description of Marketing Initiatives*
I	Full Time Marketing Manager (#1)
	Single Focused Theme (#2)
	Targeted Priority Markets (#3)
	Coordinated Marketing Information System (#4)
	Tourism Road Signage (#5)
	Industry Training Programs (#15)
	Public and Industry Awareness Programs (#16)
	Promote Region Through Strategic T.I.C.'s (#17)
II	Specialized Travel Packages (#6)
	Promotion of Local Products (#7)
	Boating Strategy (#8)
	Historic Building Recognition (#9)
	Heritage Home and Garden Tours (#10)
	Ancestral Registry (#11)
	Existing Natural Habitat/Protected Areas (#12)
	Winter Brochure(s) (#13)
	Relocate the Fredericton Westbound T.I.C. (#18)
	Heritage Walking Tour Enhancements (#19)
	Sussex Write-up (#20)
III	Promote Sussex Winter Activities (#21)
	Promote LSJRV and Fundy Coast in Sussex (#22)
	Market Tours of Gagetown to Special Groups (#23)
	Promote Sports Fishery Opportunities (#24)
	Monitoring System (#14)

* The numbers after each marketing initiative are the numbers assigned to this opportunity in **Chapter 7.0**.

Table 8.3

IMPLEMENTATION SCHEDULE - GROUP I PRIORITIES

Priority Group	Item	Description*	Year 1 2 3 4 5
I	**DEVELOPMENT OPPORTUNITIES**	Scenic Touring Routes Designation (#1)	oooo
		Scenic Touring Routes Improvements (#2)	ooooooo*********************-------
		Improved Boating Facilities (#5)**	ooooooo******* -------------------- ooo*****************----------------
		Bed & Breakfast Accommodations (#10)	ooo********************************* -----------------------------
		Upgraded Accommodations (#11)	ooooo******************************* ------------------------------------
		Upgraded Foodservices (#12)	ooooo***---------------------------- ------------------------------------
		Major Hotel Accommodations - Fredericton (#17)	ooooo************-------------------
I	**MARKETING INITIATIVES**	Full-Time Marketing Manager (#1)	ooo---------------------------------
		Single Focused Theme (#2)	ooooo-----
		Targeted Priority Markets (#3)	ooooo-----
		Coordinated Marketing Information System (#4)	ooooooooo--------------------------
		Tourism Road Signage (#5)	oooooo-------
		Industry Training Programs (#15)	ooooooo--------------------
		Public and Industry Awareness Programs (#16)	oooooooo------
		Promote Region Through Strategic T.I.C.'s (#17)	ooo------------------------------

LEGEND:	
Planning & Approvals	oooooo
Construction Phase	******
Operations	------

* The number in parentheses at the end of each opportunity and marketing initiative description refers to the item number assigned in **Chapters 6.0 and 7.0**, respectively. This is simply a cross-reference and the number has no significance in terms of priority ranking. **All items in any Priority Group have equal priority**.

** This item includes the development opportunities and marketing initiatives developed in the 1986 "Development Strategy for Recreational Boating".

Table 8.4

IMPLEMENTATION SCHEDULE - GROUP II PRIORITIES

Priority Group	Item	Description*	Year 1 2 3 4 5
II	**DEVELOPMENT OPPORTUNITIES**	Sportfishery Development (#7)	oooooooooo******-------------------- ------------------------------------
		Downtown Improvement Programs (#8)	oooooooooo************************** ------------------------------------
		Natural Habitat/Protected Areas Viewing Facilities (#9)	oooo*******----------------------
		Hartt Island Waterbased Amusement Park (#15)	oooooooooo*******-------------------
		Oromocto Riverfront Accommodations (#18)	ooooooo**********-------------------
		Riverboat Replica (#29)	ooooooo******--------------------
		Marco Polo/Historic Village (#30)	ooooooooooo****************--------- --------------
		Tour Boat(s) - Lower River (#31)	ooooooo************-----------
		Heritage Attractions - Gagetown (#33)	ooooooo***********--------------- --------------------
		Resort Hotel/Marina Complex (#35)	ooooooooooo**************--------

LEGEND:		
	Planning & Approvals	oooooo
	Construction Phase	******
	Operations	------

* The number in parentheses at the end of each opportunity and marketing initiative description refers to the item number assigned in **Chapters 6.0 and 7.0**, respectively. This is simply a cross-reference and the number has no significance in terms of priority ranking. **All items in any Priority Group have equal priority.**

Table 8.4
(Cont'd)

IMPLEMENTATION SCHEDULE - GROUP II PRIORITIES

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__________________________________________________________________________________________
Priority                                                             Year
                                                     _____________________________________
 Group      Item              Description*           |   1  |   2  |  3   |  4   |   5   |
                                                     |      |      |      |      |       |
__________________________________________________________________________________________

   II    MARKETING       Specialized Travel             oooooooooooooooooooooooooooooooooo
         INITIATIVES     Packages (#6)                      ------------------------------

                         Local Products Promotion            oooooooooo-------------------
                         (#7)

                         Boating Strategy (#8)       -------------------------------------

                         Historic Building              oooo**********---------
                         Recognition (#9)

                         Heritage Homes/Garden          ooooooo---------------------------
                         Tours (#10)

                         Ancestral Registry (#11)       oooooooooooooo--------------------

                         Exhibiting Natural Habitat/      ooooooo-------------------------
                         Protected Areas (#12)

                         Winter Brochure (#13)             oooooo-------------------------

                         T.I.C. Relocation -                ooooo***
                         Fredericton (#18)

                         Heritage Walking Tours                         oooo--------------
                         Enhancements (#19)

                         Sussex Write-up (#20)                  oooo----------------------
__________________________________________________________________________________________
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LEGEND: Planning & Approvals oooooo
Construction Phase ******
Operations ------

* The number in parentheses at the end of each opportunity and marketing initiative description refers to the item number assigned in **Chapters 6.0 and 7.0,** respectively. This is simply a cross-reference and the number has no significance in terms of priority ranking. **All items in any Priority Group have equal priority.**

Table 8.5

IMPLEMENTATION SCHEDULE - GROUP III PRIORITIES

Priority Group	Item	Description*	Year 1 | 2 | 3 | 4 | 5
III	**DEVELOPMENT OPPORTUNITIES**	Hiking Trail System - Linear Park (#3)	ooooooo*******---------------- ooooooooooo
		Summer Theatre (#13)	oooooooooo------------------
		Summer Crafts Program (#14)	oooooooooo------------------
		Poley Mountain Night Skiing (#20)	oooo****----------------
		Meeting & Banquet Facilities-Sussex (#22)	ooooooo**********------------
		Covered Bridge Sites (#23)	ooooo********------------ -----------------------------------
		Long Reach Camping Facilities (#28)	ooooooooo***********---------
		Historic Coal Mining Village (#36)	oooooooo*************
III	**Marketing Initiatives**	Winter Activities Promotion-Sussex (#21)	ooooooo---------------------
		Promotion of LSJRV and Fundy Coast (#22)	ooooooo---------------------
		Market Special Group Tours (#23)	ooooo------------------------ -----------------------------------
		Sportsfishing Promotion	ooooo---------------
		Monitoring System (#14)	ooooooooooo-----------------

LEGEND: Planning & Approvals ooooo
Construction Phase ******
Operations ------

* The number in parentheses at the end of each opportunity and marketing initiative description refers to the item number assigned in **Chapters 6.0 and 7.0**, respectively. This is simply a cross-reference and the number has no significance in terms of priority ranking. **All items in any Priority Group have equal priority.**

Table 8.6

IMPLEMENTATION SCHEDULE - GROUP IV PRIORITIES

Priority Group	Item	Description*	Year 1	Year 2	Year 3	Year 4	Year 5
IV	**DEVELOPMENT OPPORTUNITIES**	Bicycle Trail Network (#4)	----	-------	-------	-------	--------
		Canoeing Facilities (#6)	ooooo	*****--	-------	-------	--------
		Local Exhibits - Sussex(#21)			ooooooo	******-	--------
		Henderson Brook Beach (#24)			ooooooo	***----	--------
		Westfield Common Pavilion (#25)			oooo***	****---	--------
		Westfield Beach (#26)			ooooooo	***----	--------
		Victoria Beach (#27)			ooooooo	***----	--------
		Mount House Tours (#34)			ooooooo	****---	--------

LEGEND:		
	Planning & Approvals	oooooo
	Construction Phase	******
	Operations	------

* The number in parentheses at the end of each opportunity and marketing initiative description refers to the item number assigned in **Chapters 6.0 and 7.0,** respectively. This is simply a cross-reference and the number has no significance in terms of priority ranking. **All items in any Priority Group have equal priority.**

It is also important to realize that the scheduling for several of the private sector initiatives could come earlier, depending on the interest, initiative and commitment of individual developers.

The high priority recommendations require the direct involvement of the LSJRVPA and should receive its full attention in the coming year.

It is evident from examining these tables that in some cases the development opportunities or marketing initiatives are a combination of items which are currently on-going or part of other programs identified in this strategy. In these cases, two parallel lines indicating the scheduling and duration of activities are shown. For example, the improvement of boating facilities (#5) in the Priority Group I of development opportunities shows 2 lines. One schedule line relates to the implementation of items identified specifically in this project (those relating to the small craft facilities including launch ramps and enhancements of the riverboat wharf facilities). The other line relates to the on-going implementation of items identified as part of the previously completed "Development Strategy for Recreational Boating in New Brunswick". Similarly, the development of Bed and Breakfast accommodations has two lines. The first of these lines relates to activities inherent in this strategy and the lower line relates to continued and expanded operation of the existing Bed and Breakfast facilities.

It is important to stress that the First Priority items involve placing high priority on the acquisition of a full-time Marketing Manager (marketing initiative #1). It is also evident that other marketing initiatives have been scheduled so that although the association and provincial government can jointly carry on with implementation efforts which evolve from this project, it is proposed that the full-time marketing manager be on-line to participate in the planning for all other marketing initiatives.

ECONOMIC IMPACTS

FGA

9.0 ECONOMIC IMPACTS

9.1 Introduction

Economic impacts from increased levels of expenditures and employment creation in the Lower Saint John River Valley Region will result from the following two sources during and subsequent to the implementation plan:

1). The **Implementation Phase Impacts** - during the 5 year period of tourism development opportunities construction and marketing initiatives implementation; and

2). The **Tourism Industry Operations Phase Impacts** - subsequent to the implementation phase, the region will realize a net increase in tourism expenditures and employment which occur as a result of the new developments and marketing initiatives.

Both expenditures (direct, indirect and induced) and employment creation constitute the gross economic impact from the opportunity developments and marketing initiatives presented in **Chapters 6.0 through 8.0**.

Direct economic impacts will arise from tourist expenditures on goods and services in the region. Indirect impacts will arise from expenditures on goods, services and wages that result from previous expenditures, while induced impacts result from expenditures in industries which serve the product markets. The net effect of indirect and induced impacts are referred to as "spin-off" or "multiplier effects". In the case of tourism expenditures an example would be tourists spending money on a tourist activity which employs people who spend their income on food and clothing. The grocery stores buy agricultural produce from farms which support the farmer's incomes, and so on down the line. Using the Statistics Canada Input-Output Model of production activity and expenditures, the multiplier effects and total impact of tourist expenditures can be estimated. In this chapter, this is done for both tourist and construction expenditures and employment.

To simplify this analysis the total impact of the construction activities and marketing initiatives have been based on the total for the 5-year implementation period. It has also been assumed that the increase of growth of tourism activity will achieve its total net increased level at the end of the 5 year implementation period. This overlooks the phasing in of increases in tourist expenditures achieved throughout the latter part of the implementation period in response to the earlier implemented tourism developments and marketing initiatives. In other words, once the development opportunities and marketing initiatives have been fully implemented, the net increases of tourism expenditures will commence at the predicted level and will be retained at that level annually thereafter. In this regard the estimates of the total economic impacts of the tourism development opportunities and marketing initiatives may be somewhat conservative; this will be offset by possible lags of the effects from developments implemented in the latter part of the 5 year period.

It should be noted that although this report does not quantify the increased tax revenue impacts resulting from net tourist expenditures, incomes, properties and fuel usage; considerable benefits from increased tax revenues exist and are received at the following government levels:

1). increased property taxes to municipalities and the Province;

2). increased sales taxes to the Province;

3). increased manufacturing taxes to the Federal Government;

4). increased fuel taxes to the Province and the Federal Government; and

5). increased income taxes to the Province and the Federal Government.

9.2 Existing Tourism Industry Expenditures and Employment

To determine the net economic impact of the tourism developments and marketing initiatives presented in the implementation plan, the base levels of the total expenditures and employment have been estimated. The most recent tourism visitation and expenditure data available are from the 1986 Canadian Travel Survey (CTS). Supplementary data are available from the 1983 N.B. Auto Exit Survey (NBAES).

The CTS provides expenditures information for resident New Brunswicker's and other Canadian resident's spending in the Counties of York, Sunbury, Queens, Kings, Saint John and Charlotte. From the NBAES the actual visitors to the Lower Saint John River Valley Region (including the City of Saint John) constitute 75.8 percent of these counties. On the other hand, the NBAES indicates that visitors from the USA and other foreign countries comprise 32 percent of all non-resident visitors. Using these data to prorate the 1986 CTS data, indicates that there were approximately 280,000 non-resident person-trips and 850,000 resident person-trips for a total of 1,130,000 person-trips to the LSJRVR. These visitors spent a total of $78 million in the LSJRVR in 1986, $40 million by residents and $38 million by non-residents. **In 1988 dollars** this total would be equivalent to **about $85 million in tourism expenditures in the region.** Using composite multipliers of expenditures and employment created from these direct tourism expenditures indicate that a **total of $140 million of expenditures and 2,390 person-years of employment result directly and indirectly from these tourism expenditures.**

9.3 Implementation Phase Impacts

The **total capital costs of all of the development opportunities** presented in the 5-year implementation plan have been estimated to range between **$47 million and $62 million (1988 dollars). Of this, private investment** expenditures comprise between **$38 million and $50 million** of the total, while **public expenditures range from $9 million to $12**

million. Using an average of the total capital cost estimates range, total direct expenditures will be $54.5 million. This will in turn generate a total **construction expenditures impact of $86 million with 986 person-years** of direct construction and indirect/induced employment **over the 5 year period**.

It should be emphasized that the above expenditures and employment exclude the capital costs of the development opportunities which were addressed in other studies on recreational boating, riverfront developments in Fredericton and Oromocto and Partridge Island development. Furthermore, these costs exclude consideration of the major potential expenditures associated with the Marco Polo Historic Village and the Historic Coal Mining Village. These are both potentially major projects which cannot be costed until further activity is undertaken on concept development.

During the 5 year implementation phase, expenditures on the recurring and one-time expenses of marketing initiatives are estimated to total $850,000. These direct expenditures **result in an expenditures impact of $1.4 million and 24 person-years of direct and indirect/induced employment**.

Table 9.1 summarizes the capital construction and marketing operations expenditures impacts for the entire 5-year implementation period. These capital construction expenditures and employment impacts are one-time and last only through the 5-year construction period. They will diminish very rapidly at the end of the implementation phase, at which time the capital investments have been expended and construction workers have moved to other projects.

9.4 Tourism Industry Operations Impacts

The net expenditures resulting from implementation of the development opportunities and marketing initiatives have been estimated from the existing direct tourism expenditures of $85 million in 1988 dollars. At

Table 9.1

ECONOMIC IMPACTS OF IMPLEMENTATION PHASE CAPITAL CONSTRUCTION AND OPERATING EXPENDITURES*

	Economic Impacts of 5 Year Implementation Plan		
	Construction	Marketing Operations	Total
Net Expenditures ($1988 x Million)			
Direct Expenditures	$54.5	$0.85	$55.35
Indirect/Induced Expenditures	31.5	0.55	32.05
Total Expenditures	86.0	1.4	87.4
Net Employment (Person-Years)			
Direct Employment	501	14	515
Indirect/Induced Employment	485	10	495
Total Employment	986	24	1,010

---

* Expenditures are given in constant 1988 dollars for the entire 5 year implementation phase period.

present, the Lower Saint John River Valley Region performs approximately 30 percent below the Provincial average in length of stay of visitors (ie. 1.4 versus 1.9 person-days per visit, respectively) and average expenditures ($28.06 versus $36.15 per person-night, respectively).

Therefore, if the proposed LSJRVR tourism development opportunities and marketing initiatives bring the region's product up to the provincial level, it will improve direct expenditures by about 30 percent by the end of the 5 year implementation period. This represents an incremental average annual growth rate of 5.4 percent per annum during the 5-year implementation period. A net increase of 30 percent in tourism industry activity would constitute an increase of $25.5 million (1988 dollars) in net direct tourist expenditures per annum which would be accountable to the proposed tourism development opportunities and marketing initiatives. These additional annual direct tourism expenditures would result in a total of $42 million and 717 person-years of direct, indirect and induced expenditures and employment, respectively.

Table 9.2 presents the net annual expenditures and employment created as a result of the enhanced level of tourism activity once the 5-year implementation plan development opportunities and marketing initiatives have been completed. Three tourism industry growth scenarios are presented to test the sensitivity of 10 percent variations in the region's tourism performance relative to the provincial average level of activity. They are:

Scenario 1: (N.B. Average)	the LSJRVR achieves the equivalent of the provincial average levels of tourism activity (ie. 30 percent above the region's existing level);
Scenario 2: (High)	the LSJRVR exceeds provincial average levels of tourism activity by 10 percent, (ie. 40 percent above the region's existing level); and

Table 9.2

NET INCREMENTAL IMPACTS OF ANNUAL TOURISM EXPENDITURES

	Net Tourism Expenditures Growth*		
	Scenario 1 (Provincial Average	Scenario 2 (High)	Scenario 3 (Low)
Net Additional Annual Expenditures ($1988 x Million)			
Direct Expenditures	$25.5	$34.0	$17.0
Indirect/Induced Expenditures	16.5	22.0	11.0
Total Expenditures	42.0	56.0	28.0
Net Additional Employment (Person-Years)			
Direct Employment	426	568	284
Indirect/Induced Employment	291	388	194
Total Employment	717	956	478

* Net tourism expenditures growth scenarios apply only to the increased expenditures which result from the tourist developments and marketing initiatives given in the 5 year implementation plan.

Scenario 3: the LSJRVR achieves 10 percent less than the provincial
(Low) average levels of tourism activity, (ie. 20 percent above the region's existing level).

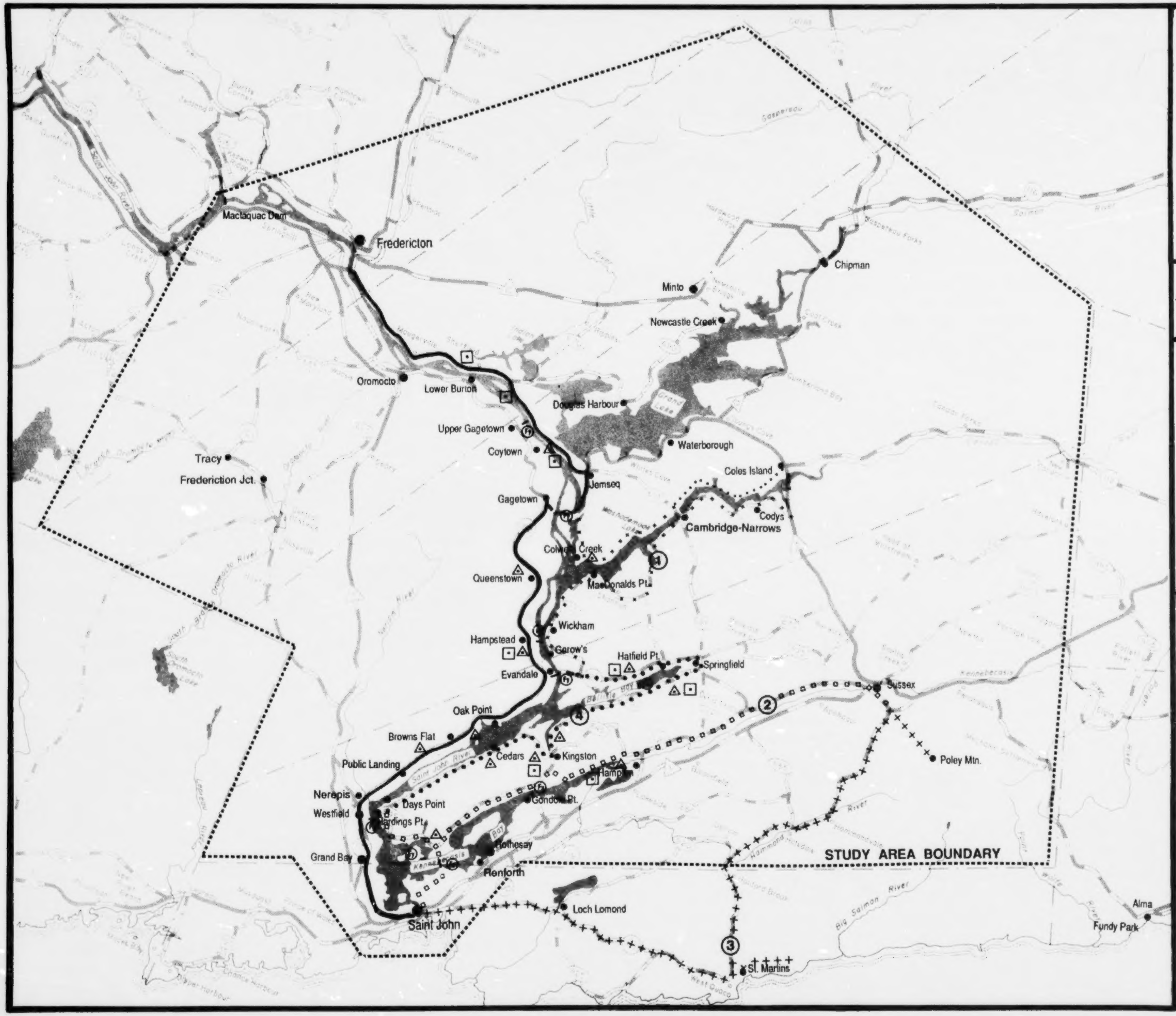
9.5 Summary of Economic Impacts

In summary, the economic impacts to be derived from public and private capital and operating expenditures on the tourism development opportunities and marketing initiatives during the 5 year implementation phase, will provide the LSJRVR with over $87 million of direct and indirect/induced expenditures.

Upon completion of the implementation phase, the LSJRVR can be expected to have attained approximately the provincial average levels of tourism activity and thereby increased its economic base by about 30 percent. **This would move the region's annual total direct expenditures (in 1988 dollars) from $85 million to $110.5 million, a net increase of $25.5 million in direct tourism expenditures. These net direct tourist expenditures result in a total net increase of $42.0 million and 717 person-years of net direct, indirect and induced expenditures and employment, respectively, which will be retained annually in the region.**

APPENDIX

FIGURES 2 TO 7 FROM CHAPTER 6.0


Mactaquac Dam
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Chipman
Minto
Newcastle Creek
Grand Lake
Oromocto
Lower Burton
Douglas Harbour
Upper Gagetown
Coytown
Waterborough
Tracy
Fredericton Jct.
Jemseq
Coles Island
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Codys
Washademoak Lake
Cambridge-Narrows
Colwells Creek
Queenstown
Macdonalds Pt.
Wickham
Hampstead
Gerow's
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Belleisle Bay
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Browns Flat
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Cedars
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Poley Mtn.
Public Landing
Hampton
Nerepis
Days Point
Gondola Pt.
Westfield
Hardings Pt.
Kennebecasis Bay
Rothesay
Grand Bay
Renforth
STUDY AREA BOUNDARY
Loch Lomond
Saint John
St. Martins
Alma
Fundy Park

TOURISM INDUSTRY STUDY OF THE LOWER SAINT JOHN RIVER VALLEY REGION

ÉTUDE TOURISTIQUE DE LA REGION DU BAS SAINT-JEAN

PROPOSED AUTO TOURING SCENIC ROUTES

ROUTES PANORAMIQUES PROPOSÉES POUR EXCURSIONS EN VOITURE

LEGEND

———	RIVER ROAD
· · · ① · · ·	WASHADEMOAK LAKE
▫ ▫ ▫ ② ▫ ▫ ▫	KENNEBECASIS VALLEY
+ + + ③ + + +	POLEY MOUNTAIN / FUNDY COAST
• • • • ④ • • • •	BELLEISLE BAY / LONG REACH
– Ⓕ	FERRY
△	SCENIC LOOKOUT
⊡	UNDERBRUSH CUTTING

LÉGENDE

———	CHEMIN DE LA RIVIÈRE
· · · ① · · ·	LAC WASHADEMOAK
▫ ▫ ▫ ② ▫ ▫ ▫	VALLÉE KENNEBECASIS
+ + + ③ + + +	MONTAGNE POLEY / LITTORAL DE FUNDY
• • • • ④ • • • •	BAIE BELLEISLE / TRAVERSIER DE LONG REACH
– Ⓕ	TRAVERSIER
△	POST D'OBSERVATION
⊡	COUPE DU SOUS-BOIS

FIGURE 2

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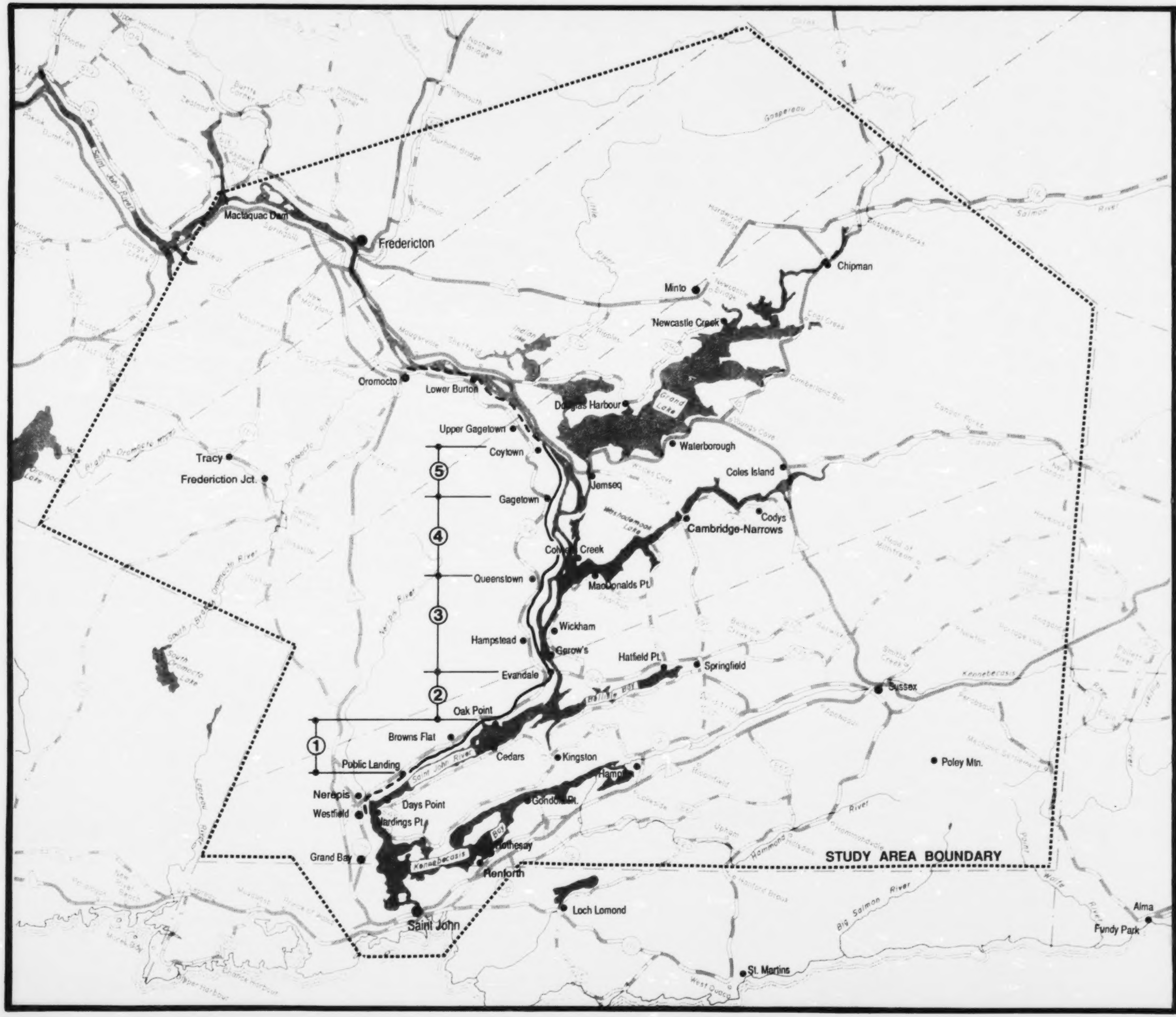
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Douglas Harbour
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Upper Gagetown
Coytown
Tracy
Frederiction Jct.
Waterborough
Coles Island
Jemseg
Gagetown
Codys
Cambridge-Narrows
Washademoak Lake
Colwells Creek
Queenstown
MacDonalds Pt.
Wickham
Hampstead
Gerow's
Hatfield Pt.
Springfield
Evandale
Sussex
Oak Point
Belleisle Bay
Browns Flat
Cedars
Kingston
Public Landing
Poley Mtn.
Hampton
Nerepis
Westfield
Days Point
Gondola Pt.
Hardings Pt.
Rothesay
Kennebecasis Bay
Grand Bay
Renforth
STUDY AREA BOUNDARY
Saint John
Loch Lomond
St. Martins
Fundy Park
Alma
Big Salmon River
Gaspereau
Salmon River
Kennebecasis
①
②
③
④
⑤

TOURISM INDUSTRY STUDY OF THE LOWER SAINT JOHN RIVER VALLEY REGION

ÉTUDE TOURISTIQUE DE LA REGION DU BAS SAINT-JEAN

POTENTIAL LINEAR PARK / TRAIL DEVELOPMENT

AMÉNAGEMENT LINÉAIRE ÉVENTUEL DE PARCS ET DE SENTIERS

LEGEND

——— LINEAR PARK / TRAIL

- - - - - ADDITIONAL RAIL R.O.W.

② SECTION NUMBER

LÉGENDE

——— PARC ET SENTIER LINÉAIRE

- - - - - AUTRE EMPRISE FERROVIAIRE

② NUMÉRO DE SECTION

FIGURE 3

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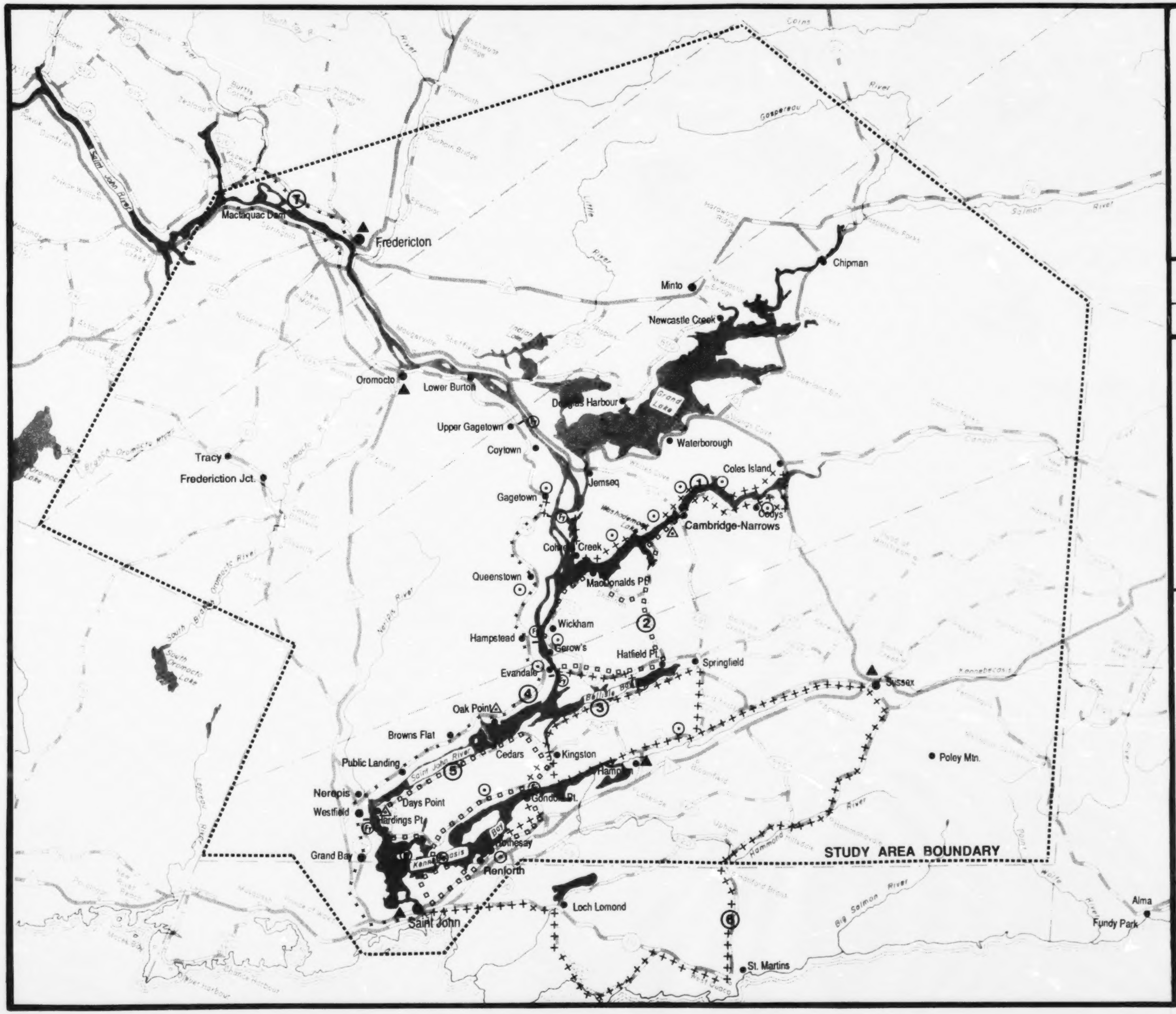

Saint John River
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Fredericton
Minto
Chipman
Newcastle Creek
Grand Lake
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Lower Burton
Douglas Harbour
Upper Gagetown
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Waterborough
Tracy
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Gagetown
Cambridge-Narrows
Codys
Washademoak Lake
Colwell Creek
Queenstown
Macdonalds Pt
Wickham
Hampstead
Gerow's
Hatfield Pt
Springfield
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Oak Point
Browns Flat
Cedars
Kingston
Public Landing
Hampton
Poley Mtn.
Nerepis
Westfield
Days Point
Hardings Pt
Gondola Pt.
Grand Bay
Kennebecasis Bay
Rothesay
Renforth
STUDY AREA BOUNDARY
Loch Lomond
Saint John
St. Martins
Alma
Fundy Park
1
2
3
4
5
6

TOURISM INDUSTRY STUDY OF THE LOWER SAINT JOHN RIVER VALLEY REGION

ÉTUDE TOURISTIQUE DE LA REGION DU BAS SAINT-JEAN

POTENTIAL BICYCLE TOUR ROUTES

ROUTES POSSIBLES POUR EXCURSIONS EN VÉLO

LEGEND

⊙	INN / BED & BREAKFAST
△	CAMPING
▲	ALL TYPES OF ACCOMMODATIONS
- Ⓕ	FERRY CROSSING
· · ③ · ·	ROUTE NUMBER

LÉGENDE

⊙	AUBERGE / GÎTE DU PASSANT
△	CAMPING
▲	TOUS LES TYPES D'HÉBERGEMENT
Ⓕ	TRAVERSIER
③	NUMÉRO DE ROUTE

FIGURE 4

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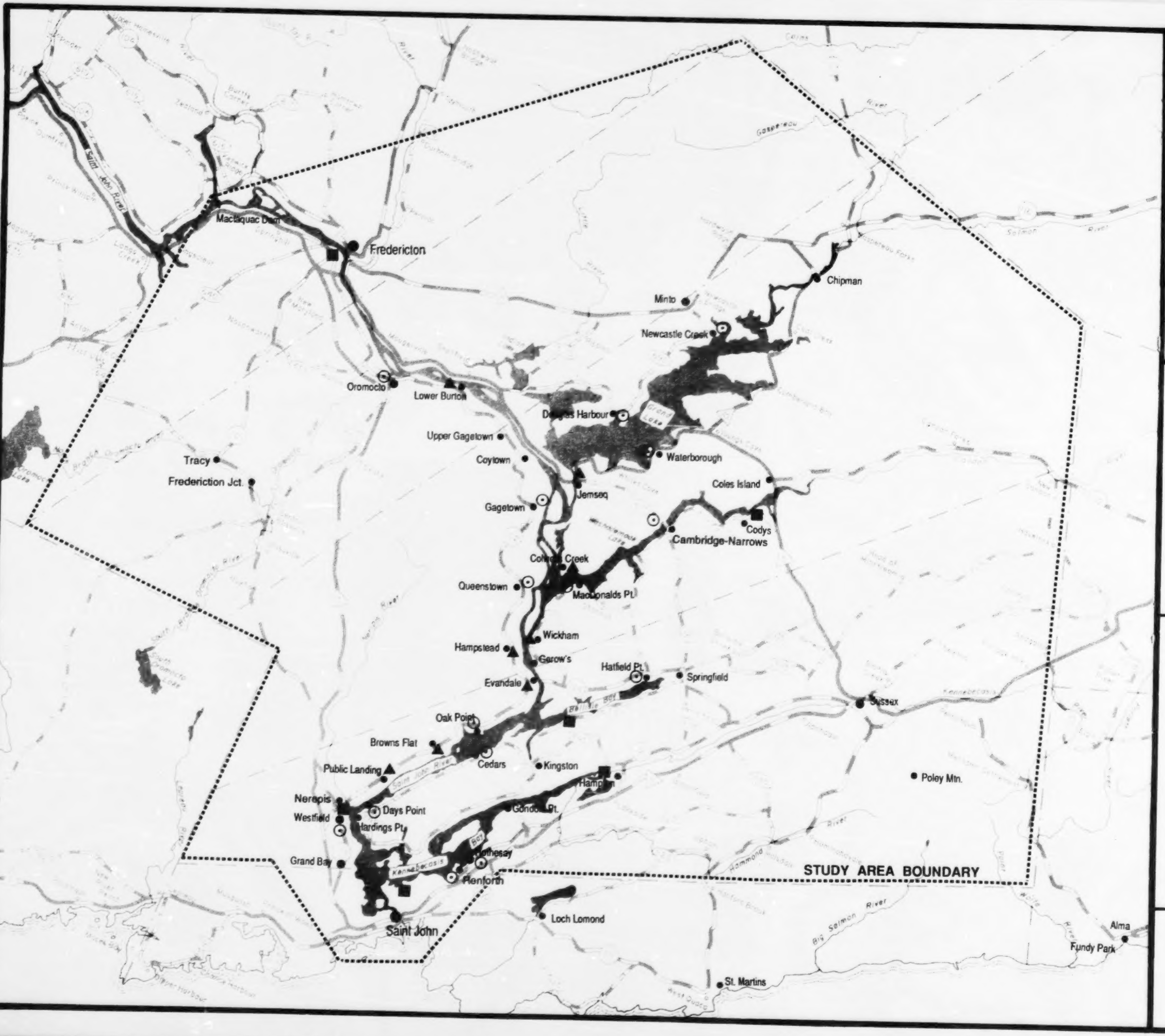
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Cedars
Kingston
Public Landing
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Poley Mtn.
Nerepis
Days Point
Westfield
Hardings Pt.
Gondola Pt.
Kennebecasis Bay
Rothesay
Grand Bay
Renforth
Hammond River
STUDY AREA BOUNDARY
Saint John
Loch Lomond
Big Salmon River
Alma
Fundy Park
St. Martins

TOURISM INDUSTRY STUDY OF THE LOWER SAINT JOHN RIVER VALLEY REGION

ÉTUDE TOURISTIQUE DE LA REGION DU BAS SAINT-JEAN

PROPOSED NETWORK OF PUBLIC WHARVES AND SMALL BOAT LAUNCH RAMPS

RÉSEAU PROPOSÉ DE QUAIS PUBLICS ET RAMPES DE MISE À L'EAU POUR PETITS BATEAUX

LEGEND

▲ PUBLIC WHARF

■ SMALL BOAT LAUNCH RAMP

⊙ PUBLIC WHARF AND LAUNCH RAMP

LÉGENDE

▲ QUAI PUBLIC

■ RAMPE DE MISE À L'EAU POUR PETITS BATEAUX

⊙ QUAI PUBLIC ET RAMPE DE MISE A L'EAU

FIGURE 5

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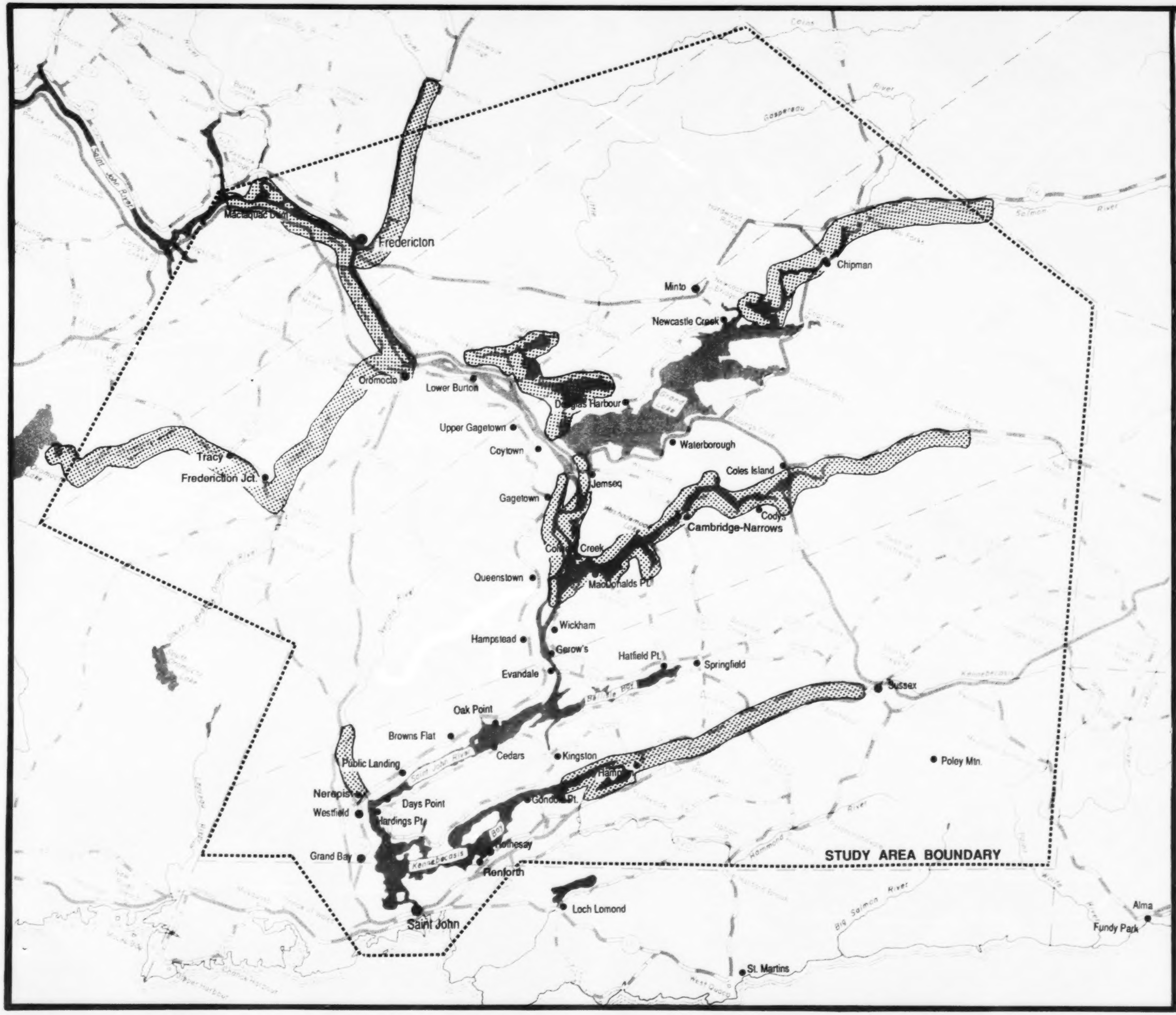
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Alma
Fundy Park
St. Martins
Salmon River
Gaspereau River

TOURISM INDUSTRY STUDY OF THE LOWER SAINT JOHN RIVER VALLEY REGION

ÉTUDE TOURISTIQUE DE LA REGION DU BAS SAINT-JEAN

CANOEING AREAS

ZONES DE CANOTAGE

LEGEND

▨ PRIME AREAS

LÉGENDE

▨ PRINCIPALES ZONES

FIGURE 6

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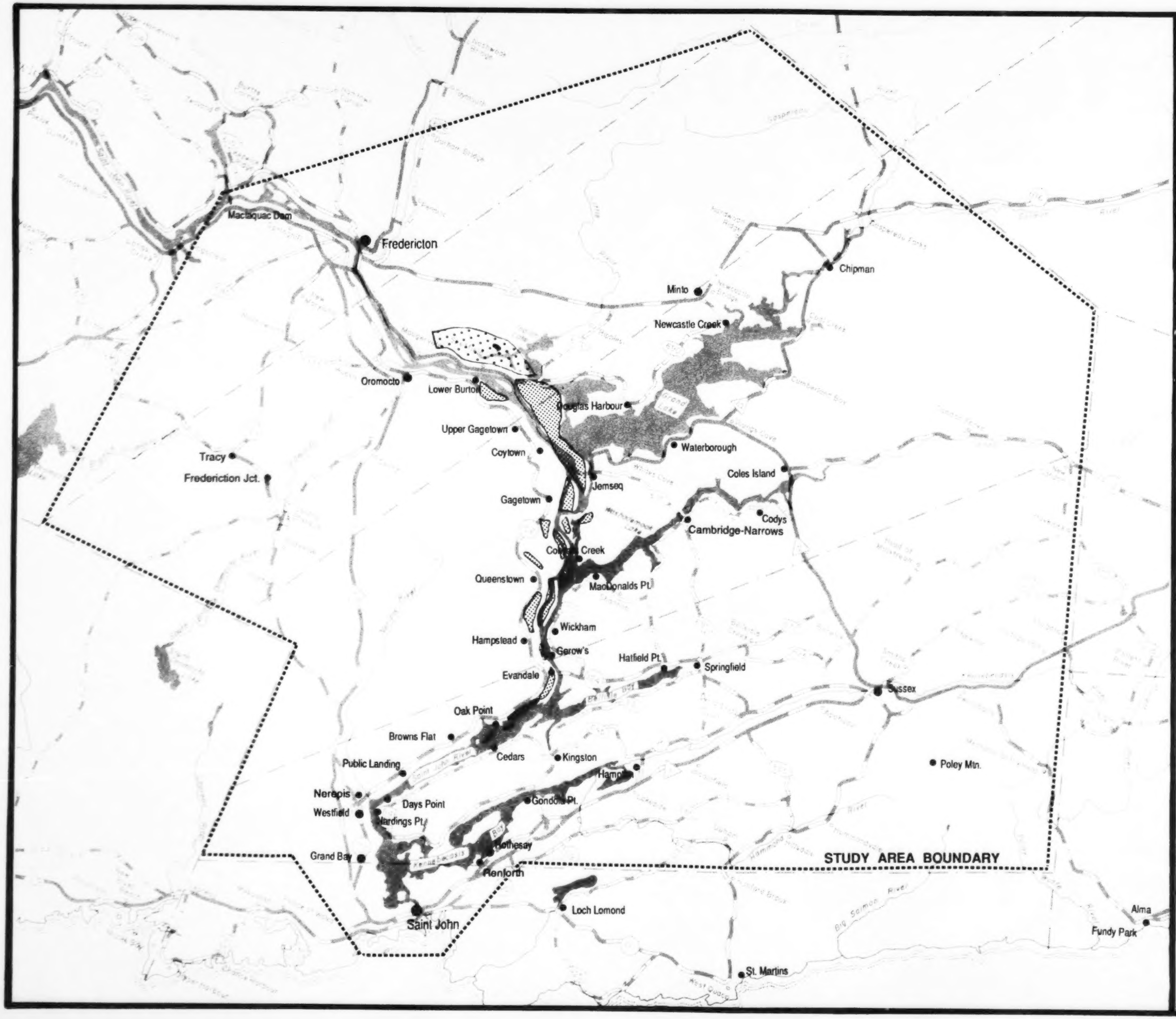
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St. Martins

TOURISM INDUSTRY STUDY OF THE LOWER SAINT JOHN RIVER VALLEY REGION

ÉTUDE TOURISTIQUE DE LA REGION DU BAS SAINT-JEAN

NATURAL HABITAT / PROTECTED AREAS

HABITAT NATUREL / ZONES PROTÉGÉES

LEGEND

░ PORTOBELLO NATIONAL WILDLIFE AREA

▒ MIGRATORY BIRDS BREEDING / STAGING AREAS

■ SPECIAL INTEREST AREAS

LÉGENDE

░ ZONE NATIONALE DE LA FAUNE DE PORTOBELLO

▒ ZONES DE NIDIFICATION ET D'ARRÊT DES OISEAUX MIGRATEURS

■ ZONES D'INTÉRÊT SPÉCIAL

FIGURE 7

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